

Survey of Visitors to Bornholm

January 1998 - December 1998

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ISBN: 87-90144-45-7

ISBN: 87-90144-73-2

ISSN: 1396-6359

Preface

In the latter part of 1994, the Danish Research Council for the Social Sciences funded the establishment of a Unit for Tourism Research at Bornholms Forskningscenter. Tourism is a formidable economic activity within the European Union and in line with this, the focus of the research programme is the investigation of tourism in the peripheral areas of Europe. Many peripheral areas have strong natural environments which make them attractive to tourists, particularly in the light of the public's concern with environmental issues. Experience has shown that tourism has been able to safeguard and create jobs in marginal regions which have little prospect of attracting alternative industries.

The objectives of the Unit are to study:

- Patterns of demand for tourism in peripheral areas;
- The behaviour and structure of the tourism industry;
- The social aspects and consequences of tourism;
- Tourism as a strategy for the development of peripheral areas;
- The integration of relevant theories and development in tourism;
- The sustainable development of communities in terms of economic, environmental and social factors.

The programme is managed by Henrik Christoffersen, AKF - Institute of Local Government Studies, Svend Lundtorp, Bornholms Forskningscenter and Stephen Wanhill, Bournemouth University and Bornholms Forskningscenter; Stephen Wanhill being the researcher responsible for the tourism programme. In addition, the Research Council has approved other partners to undertake projects within the Unit for Tourism Research. Included with the institutions already mentioned are the Danish Institute of Border Region Studies, the Danish Forest and Landscape Research Institute and particular researchers, Anne-Mette Hjalager, Advance/1, Wolfgang Framke, Copenhagen Business School and Jan Mattsson, University of Roskilde.

The passenger survey carried out by the research centre is, to our knowledge, the largest of its kind carried out in Denmark. The survey will continue until the summer of 1999.

Svend Lundtorp
Chief of Research
February 1999

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The composition of the report

The report is divided into four chapters. The first chapter provides the reader with some general information about the survey design. In the second chapter the collected data are used to estimate the number of visitors and visitor nights in 1996, 1997 and the first half of 1998. The third section describes the visitors departing by ferry in the period January 1998 - December 1998. The questions were asked partly to assess whether the sample was representative of known characteristics of visitors from other sources and partly to be able to analyse the results by key variables. The Bornholm residents were filtered through a screening process, but they were asked some supplementary questions. The findings of these are described in chapter four.

1. Survey design

1.1 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 Denmark's Statistic, and evidence from national surveys commissioned by the Danish Tourist Board, there has been very little market research concerning visitors to the island. Earlier studies have been:

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

1.2 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. Enclosed as Appendix I is the questionnaire concerning sea departures in 1998. The questionnaires were made up in four different languages (Danish, Swedish, German and English).

1.3 Survey methodology

It was agreed that the survey should run from 1 July 1995 to 30 June 1999. 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 Saßnitz (Germany) and Scandlines/DFO's to Ystad and Saßnitz. 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.

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 among tourists visiting the island by ferry in early June with a sample of 50 respondents. A target of 3 000 visitor contacts (departures) per year was set with a screen questionnaire to filter out local residents. It was anticipated that the chosen method of interviewing would lead to some wastage in the form of unusable returns, but this could be accommodated within the target.

1.4 The year 1998

This report covers the tourists and the residents leaving Bornholm by ferry in the period 1 January 1998 - 31 December 1998. The frequency tables in the report are based on the statistics shown in table A.

Table A Sample

	1st Qtr 1998		2nd Qtr 1998		3rd Qtr 1998		4th Qtr 1998		All Year	
	Base	%	Base	%	Base	%	Base	%	Base	%
Visitors	228	37	462	56	917	79	107	24	1714	56
Residents	397	64	362	44	245	21	345	76	1349	44
Total	625	100	824	100	1162	100	452	100	3063	100

Overall, some 56% of the sample were visitors. Some 61% of contacts were male and 39% were female.

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

1.5 Acknowledgements

It would have been impossible to conduct this survey without the help and effort of many people. The ferry companies, BornholmsTrafikken and DFO/Scandlines have been most helpful by supplying free transport for the interviewers as well as by allowing access to the terminal areas in order to interview passengers.

The planning and design of the questionnaire was carried out by Henrik Christoffersen, Ann. Hartl-Nielsen, Nils Finn Munch-Petersen and Stephen Wanhill, with the kind help and support of several colleagues at the Research Centre. During 1998, four interviewers were involved in collecting data and the data processing. Charlotte R. Rassing was responsible for the data

processing, mainly the control of the database and analyses work. Charlotte R. Rassing took care also of the overall planning of schedules, contact with transport companies and other administrative duties in regard to the survey.

2. Number of visitors and visitors nights

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

The essential data are:

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

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

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

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

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

$$(RPR_{sea} + VPV_{sea}) + (RPR_{air} + VPV_{air})$$

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

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

The *total number of overnights* on Bornholm during the period 1 July 1995 - 30 June 1996 can be calculated as:

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

In both 1996 and 1997 the total number of overnights on Bornholm were almost 3.9 millions. In 1996 the total number of visitors turned out to be 484 000 compared with 514 000 in 1997. This indicates that the average length of stay has decreased from 1996 to 1997.

In the first half of 1996 the island was visited by 159 000 tourists. In the first half of 1997 the number of tourists increased by more than 15%. In 1998 the number was back at the same level as in 1996. The number of visitor nights in the first half of 1996 was 861 000 compared with 958 000 in 1997 and 907 000 in 1998.

This total number of overnights calculated above includes visitors staying in hotels, pensions, summer houses etc. and also visitors staying with friends and relatives. When the total number of overnights is divided into purpose of visit it is seen that visitors on holiday represent almost 70% of the total number of overnights.

The three main holiday markets for Bornholm are the rest of Denmark, Sweden and Germany. More than half of the tourists are from the rest of Denmark and almost one third are from Germany.

The picture changes to some extent when looking at the number of overnights instead of the number of tourists. The Danish and German tourists on Bornholm together represent more than three-quarters of the total number of overnights. For all the three main markets the majority of the overnights take place in July.

3. Profile and characteristics of visitors

In this section of the report the data collected among visitors departing Bornholm by ferry in the period January 1998 - December 1998 are reported.

3.1 Profile and characteristics of visitors

Profile questions were asked to distinguish between day and stay visitors (domestic and overseas), establish visitors' country of origin, whether they had been to Bornholm before, number of visits, last visit, purpose of visit, party composition, party size, length of stay and socio-economic characteristics such as occupation, age, education and household income.

Findings

3.1.1 Key markets

The key markets for the island are Denmark, Germany and Sweden (Table 3.1.1). This is true for all quarters of 1998. These countries are linked to the island by proximity and, in the main, the sea transport network, because, unlike other island destinations, there have been no major developments of air routes and charter flights. In the fourth quarter of 1998 almost two thirds of the visitors were from Denmark. This was caused by the great number of VFR visitors during Christmas time. In the main season covered in the third quarter some 43% of the tourists were Danes and 38% were from Germany.

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

3.1.2 Type of visit

About 70% of the visitors interviewed in 1998 had been to Bornholm before (Table 3.1.2). This was also the case in 1996 and 1997. As derived from the quarterly reports, the greater part of the repeat visitors are from Denmark. Clearly, Bornholm has a regular repeat following, with strong loyalty to the product. This fact is illustrated in more detail in Table 3.1.3 and Table 3.1.4. Throughout 1998 more than half of the tourists had been to Bornholm more than 5 times before. The share increases to 72% in the fourth quarter.

3.1.3 Purpose of visit

The majority of the visitors to Bornholm in the second, third and fourth quarter of 1998 came for holiday purposes (Table 3.1.5). In the first quarter the dominant purposes were visiting friends and relatives and holiday.

Overall, more than 60% of visitors in 1998 gave the purpose of their trip to Bornholm as 'Holiday'. In 1996 and 1997 the corresponding shares was respectively 59% and 67%.

3.1.4 Party composition

Visitors were asked about who they were travelling with (Table 3.1.6) and, apart from those on a day trip who were most likely to be travelling alone, adult couples and

families with children below 15 years formed the core of the market. This kept average party size to 3.18 persons (Table 3.1.7) compared with 2.86 persons in 1997 and 2.68 persons in 1996.

There are some differences in the average party size throughout the year 1998. The average party size is higher during the second and third quarter because of more family holiday groups. In the second and third quarter the average party size is 3.34 while the average party size in the first and fourth quarter is 2.52 persons. It should be noticed that there is some discontinuity between the answers to party composition and recorded personal party size in the tables. This arises from the fact that party size has an economic connotation: individuals could be travelling with someone, yet economically just paying for themselves.

3.1.5 Length of stay

Length of stay among visitors in 1998 is shown in Table 3.1.8. The visitors in the third quarter stayed more than 4 days longer than the visitors in the second quarter.

The absence of a short break market of substance on Bornholm in the main season (July and August) is reflected in an average length of stay which was 9.25 days in the third quarter of 1995, 10.78 days in the third quarter of 1996, 10.05 in the third quarter of 1997 and 9.98 days in 1998.

3.1.6 Socio-economic characteristics

Occupational characteristics of visitors in the period July 1995 - December 1998 covered are principally professional, managerial and administrative. The age ranges mirror the results in respect of party composition, with couples at the top and bottom of the age spectrum and family groups in the middle (Table 3.1.12).

Table 3.1.1: Visitors by country of residence

Country	<i>Percentages</i>				
	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: All Visitors	228	462	917	107	1714
Denmark	54	54	43	63	49
Sweden	23	22	10	22	16
Germany	20	22	38	14	30
Others	3	2	9	2	6

Table 3.1.2: Visitors by type of visit

Visit	<i>Percentages</i>				
	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: All Visitors	218	439	913	99	1669
First	13	25	37	15	29
Repeat	87	75	63	85	71

Table 3.1.3: Visitors by number of visits

Percentages

Previous Visits	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: Repeat Visit	170	311	558	76	1115
1	8	14	23	4	17
2	7	12	14	11	12
3	3	8	9	8	8
4	7	7	5	3	6
5	7	3	5	7	5
6-10	16	9	12	14	12
11-20	12	7	8	12	9
21-50	11	8	8	8	8
More than 50	29	32	16	38	24

Table 3.1.4: Visitors by last visit

Percentages

Last Visit	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: Repeat Visit	208	424	894	99	1625
First visit	11	23	37	15	29
Earlier this year	26	21	14	55	20
Last year	46	27	17	14	23
Within last 2 years	7	4	7	10	6
Within last 5 years	4	9	9	0	8
More than 5 year	6	17	17	6	15

Table 3.1.5: Visitors by purpose

Percentages

Purpose	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: All Visitors	218	439	913	98	1668
Business or other work	6	4	3	2	4
Holiday	27	55	74	35	61
Holiday/VFR	25	21	14	22	18
VFR solely	28	16	5	30	12
Education	1	2	*	2	1
Other (including above combinations)	13	2	4	9	5

Note: 1. * means less than 0.5%

Table 3.1.6: Visitors by party composition

Percentages

Party Composition	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: All Visitors	219	444	912	101	1676
Travelling alone	28	14	8	18	13
Husband/wife/partners only	30	37	34	41	35
Family group: children under 15	15	16	30	10	23
Family group: children grown up	6	9	7	6	7
Family relations/friends	6	5	3	5	4
Friend/friends	11	13	7	12	9
Other	4	6	11	8	9

Table 3.1.7: Visitors by party size

Percentages

Party Size	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: All Visitors	228	458	915	104	1705
1	34	17	10	23	16
2	39	41	39	44	40
3	10	12	18	13	15
4	8	18	21	13	18
5	4	3	6	6	5
More than 5	5	9	6	2	6
Average (persons)	2.58	3.61	3.20	2.39	3.18

Table 3.1.8: Visitors by length of stay

Percentages

Period	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: All Visitors	219	445	913	100	1677
Day visit	15	5	4	16	6
Short stay ¹	25	24	8	15	15
Up to one week	38	44	28	51	35
One - two weeks	17	24	38	10	30
Two - three weeks	2	3	19	3	12
More than three weeks	3	1	3	5	3
Average (days)	6.96	5.87	9.98	8.83	8.43

Note: 1. Up to three days.

Table 3.1.9: Respondents' occupation

Percentages

Occupation	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: All Visitors	188	317	709	63	1277
Self-employed	4	4	5	3	5
Professional and managerial	20	23	24	13	23
Administrative	17	26	23	19	23
Clerical	4	7	4	5	5
Skilled wage earner	13	14	13	6	13
Unskilled wage earner	7	9	10	6	9
Assisting spouse	2	*	*	0	1
Employment not specified	0	*	0	5	*
Retired	21	6	12	29	13
Student	12	7	7	11	8
Economically inactive ¹	0	3	2	3	2

Notes: 1. Includes unemployed and home workers.

2. * means less than 0.5%

Table 3.1.10: Spouses' occupation

Percentages

Occupation	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: All Visitors	121	224	558	39	942
Self-employed	3	5	5	3	5
Professional and managerial	16	17	16	10	16
Administrative	18	26	22	28	23
Clerical	6	6	5	8	5
Skilled wage earner	11	16	16	3	15
Unskilled wage earner	9	9	12	5	11
Assisting spouse	1	3	1	0	1
Employment not specified	0	3	0	0	1
Retired	29	8	12	32	14
Student	7	4	3	8	4
Economically inactive ¹	0	3	8	3	6

Note: 1. Includes unemployed and home workers.

Table 3.1.11: Respondents' education

Percentages

Education	1 st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: All Visitors	184	371	722	61	1338
Up to 9 years	21	19	18	16	19
9 - 12 years	26	25	22	28	24
12 years + vocational	27	33	27	31	29
12 years + academic	27	24	33	25	29

Table 3.1.12: Respondents' age

Percentages

Age	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: All Visitors	206	401	811	70	1488
16 - 24 years	11	6	5	9	6
25 - 34 years	22	17	13	14	15
35 - 49 years	26	30	44	26	37
50 - 59 years	20	24	20	20	21
60 - 69 years	18	17	14	29	16
Over 69 years	2	6	4	3	4

Table 3.1.13: Visitors' gross family income per annum

Percentages

Family Income	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: All Visitors	188	358	671	62	1279
Less than 200,000 DKK	38	26	19	24	24
200,000 - 400,000 DKK	38	42	48	44	45
400,000 - 700,000 DKK	19	26	28	21	26
Greater than 700,000 DKK	6	6	6	11	6

3.2 Awareness and influences on the decision to visit Bornholm

Visitors were asked about the extent of their awareness of Bornholm and how they found out about the island. An important feature of this is school travel (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 ascertain the visitors information sources concerning Bornholm and how significant were the different aspects of Bornholm in influencing their decision to take their holiday on the island.

Findings

3.2.1 Visit to Bornholm as a child

The base for the enquiry as to whether visitors had been to Bornholm as a child was those respondents who had been to the island before. The visitors in the fourth quarter of both 1997 and 1998 were most likely to have come to the island when they were children. This reflects the great number of Danish visitors in this quarter.

Overall, 59% of the visitors in 1998 had been to Bornholm as a child. This share varies between 53% in the fourth quarter and 33% in the third.

3.2.2 Source of information

In asking holiday visitors how they found out about Bornholm, it is common with this type of question that those who have been before or cannot recall exact sources, will tend to attribute this knowledge to 'Always known'. Add to this the importance of word-of-mouth recommendation from friends/relatives and family/friends on the island and the majority of the respondents are covered. This fact can be plainly seen in Table 3.2.2. What then matters are the remaining means of communication, and here guide books/brochures and newspaper/magazine advertisement are the most important items.

3.2.3 Attractiveness of Bornholm as a destination

Using a Likert preference scale whereby a score of 4 stands for 'Very important' and 1 for 'Unimportant', holidaymakers were asked to rank the significance of the different components that make up the attractiveness of the Bornholm tourist product (Table 3.2.3). The highest scores in the period July 1995 - December 1998 were achieved by general features such as the nature, landscape and the atmosphere of the island, and the lowest in specific activities such as fishing and golf courses. This was true of all quarters. Other aspects of Bornholm that were considered 'Very important' by the visitors in 1998 and which were solicited in an 'open-ended' question, were, in order of importance:

- Peaceful atmosphere, relaxing;
- The weather in terms of sun hours for Denmark as a whole;
- Own accommodation on the island;
- Wants to show the family the island.

Table 3.2.1: Visited as a child*Percentages*

As child	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: Repeat Visits	202	418	901	97	1618
No	53	55	67	47	61
Lived on Bornholm as a child	13	10	6	16	9
With family/friends	11	14	9	14	11
With/visit family/friends	6	4	2	5	3
With school	9	10	9	8	9
With club/association	2	1	1	2	2
With above combinations	6	6	6	8	6

Table 3.2.2: Finding out about Bornholm*Percentages*

Information Source	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: All Visitors	223	462	762	107	1554
Always known	48	51	44	39	46
Family/friends on Bornholm	43	26	17	35	25
Newspaper/magazine ad.	8	9	9	10	9
Poster	4	2	2	2	2
Newspaper/magazine article	5	5	9	8	7
Travel agent	2	3	4	3	3
Club/association	2	3	3	9	3
Military	3	2	2	5	2
Family/friends	16	25	42	17	31
Guide book/brochure	6	6	12	3	9
TV ad. or programme	2	3	4	3	3
Radio	1	*	1	1	1
Travel show/exhibition	0	*	*	0	*
Other	1	*	1	1	1

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

2. Percentages can add up to more than 100% because of multiple choice.

3. * means less than 0.5%

Table 3.2.3: Aspects of Bornholm

Evaluation	1st Qtr 1998		2nd Qtr 1998		3rd Qtr 1998		4th Qtr 1998		All Year	
	142		352		768		105		1367	
Base: All Visitors	Score	Ranking	Score	Ranking	Score	Ranking	Score	Ranking	Score	Ranking
Family/friends on Bornholm	1.81	12	2.59	6	2.01	12	3.22	3	2.23	11
Beaches	2.45	6	2.68	5	2.91	5	2.58	6	2.78	5
Landscape	3.14	3	3.37	3	3.51	2	3.27	2	3.42	3
Cycle routes	2.16	10	2.10	12	2.44	10	1.98	11	2.29	9
Walking	2.43	7	2.51	8	2.57	7	2.43	7	2.53	7
Fishing towns	2.69	4	3.01	4	3.07	4	2.71	5	2.99	4
Nature	3.28	2	3.51	1	3.58	1	3.47	1	3.52	1
Golf courses	1.33	14	1.24	14	1.16	14	1.23	14	1.20	13
Fishing	1.49	13	1.44	13	1.35	13	1.64	13	1.41	12
Cultural history	2.51	5	2.65	7	2.61	6	2.33	8	2.59	6
Restaurants	2.22	9	2.27	10	2.33	11	1.82	12	2.26	10
Craft/art workers	2.26	8	2.50	9	2.54	8	2.12	9	2.47	8
Atmosphere	3.29	1	3.40	2	3.50	3	3.15	4	3.43	2
Variety of activities	2.02	11	2.14	11	2.45	9	2.05	10	2.29	9

Note: 1. The range was 'Very Important'=4 to 'Unimportant'=1

Table 3.2.4: Aspects of Bornholm assessed as very important

Percentages

Features	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: Holidaymakers	142	352	768	105	1367
Friends/family on Bornholm	67	46	24	72	38
Beaches	24	25	31	21	28
Landscape	42	55	58	45	55
Cycle routes	17	15	24	14	20
Walking	22	19	21	18	20
Fishing towns	26	31	30	29	30
Nature	56	64	63	63	63
Golf courses	4	3	2	5	3
Fishing	6	6	5	8	6
Cultural history	17	17	18	9	17
Restaurants	14	10	10	5	10
Craft/art workers	12	17	14	13	14
Atmosphere	51	56	59	42	56
Variety of activities	9	10	15	13	13

3.3 Organisation of the visit

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

Findings

3.3.1 Booking arrangements

This question has only been in the questionnaire in 1½ year.

All holidaymakers reported that they were more likely to book transport directly with the carrier than use a travel agent (Table 3.3.1). Accommodation booking arrangements reveal a similar pattern to this, in that visitors tend to book directly with the landlord/proprietor. There are some differences between the four quarters. Especially in the fourth quarter many visitors are staying with friends and relatives meaning they do not have to book at all. Visitors using a travel agent tend to choose a travel agent near their home.

3.3.2 Tourist information centre usage

Of the 7 tourist information centres on Bornholm, Velkomstcentret at Rønne is the most used, followed by the centre at North Bornholm, Allinge (Table 3.3.2). This is true of both 1996, 1997 and 1998 and relates to location at the main point of entry and the concentration of tourist accommodation. The ferries to Bornholm arrive at Rønne harbour and North Bornholm are host for many hotels. The visitors in the third quarter are generally the largest users of the tourist information network. This is not surprising since the third quarter covers the major part of the tourist season on Bornholm, and is the quarter with the highest percentage of first time visitors who are expected to have the greatest need for information.

Table 3.3.1: Booking arrangements

Information Centre	<i>Percentages</i>				
	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: All Visitors	223	451	915	103	1692
Booked transport directly with the carrier	61	55	47	80	53
Booked transport through travel agent	12	12	32	31	24
Company took care of the bookings	4	2	3	5	3
Family/friends booked transportation	1	2	3	10	3
Booked accommodation directly with the landlord	12	15	23	15	19
Booked accommodation through a travel agent	5	13	19	14	15
Staying with friends and relatives	33	19	12	72	20
Family/friends booked accommodation	4	4	3	13	4
Bought a package tour from a travel agent	4	12	11	17	11
Used a travel agent near home	7	10	16	24	14
Used a travel agent in Bornholm	8	3	7	8	6
Booked through summer house booking agency on Bornholm	2	2	4	0	3
Booked summer house through agency elsewhere	3	3	3	3	3
Travel with club/association	2	4	2	5	3

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

Table 3.3.2: Tourist information centre usage*Percentages*

Information Centre	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year 1254
Base: All Visitors	164	346	679	65	
Aakirkeby	3	1	4	2	3
Gudhjem	2	6	11	5	8
Hasle	1	4	5	2	4
Nexø-Dueodde	5	5	10	14	8
North Bornholm, Allinge	4	7	12	10	9
Rønne, Velkomstcenter	12	14	22	11	18
Svaneke	2	3	7	7	5

3.4 Accommodation usage and evaluation

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

Findings

3.4.1 Type of accommodation

In the first, second and fourth quarter of 1998 staying with friends and relatives were preferred as accommodation (Table 3.4.1). In the third quarter summer houses proved to be the most popular type of accommodation used followed by hotels.

Throughout the years 1996, 1997 and 1998 hotels and summer houses were very popular as types of accommodation. This reflects the supply on the island. The hotels and the summer houses account for more than two-thirds of the bed capacity on Bornholm.

3.4.2 Evaluation of accommodation

Table 3.4.2 presents an evaluation by all visitors in 1998 of their place of accommodation that covers nine aspects:

- The physical accommodation;
- Location;
- Facilities;
- Decor;
- Cleaning standard;
- Food and beverages;
- Service level;
- Price;
- Value for money.

Overall, the average scores on the quality of physical accommodation, location, food and beverages and service were high. This was also the case in both the second half of

1995, all 1996 and 1997. There is some concern on the price level. This is reflected in the overall value for money score, which links quality to price.

All scores during the third quarter of 1998 are below the annual averages for the year and this has a clear effect on the annual scores. Table 3.4.3 to Table 3.4.11 examine the different aspects of the visitors' perceptions of their place of stay by quarters. Overall, the tourists in the fourth quarter are the most satisfied with all aspects of their accommodation except the physical accommodation and overall value for money.

Table 3.4.1: Accommodation usage

Percentages

Accommodation	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: All Staying Visitors¹	166	391	879	72	1508
Hotel	13	25	22	25	22
B & B/Private Home	2	0	2	0	1
Farmhouse	0	1	2	0	1
Youth Hostel	1	4	4	0	3
Holiday Centre	1	6	4	0	4
Friends and Relatives	58	33	15	56	26
Summer House	16	26	29	13	26
Camping	0	3	12	1	8
Caravan	2	1	6	1	4
Other	6	2	4	4	4

Note: 1. The base includes multiple accommodation use.

Table 3.4.2: Evaluation of accommodation

Evaluation	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Average Score¹	83	250	651	40	1024
Base: All Visitors	83	250	651	40	1024
Accommodation	4.47	4.17	4.02	4.21	4.10
Location	4.41	4.42	4.28	4.67	4.34
Facilities	4.03	3.90	3.83	4.15	3.87
Decor	4.08	4.00	3.82	4.21	3.89
Cleaning Standard	4.18	3.96	3.87	4.24	3.94
Food and beverages	4.31	4.30	4.11	4.32	4.19
Service	4.47	4.21	4.11	4.63	4.19
Price level	3.93	3.89	3.52	4.06	3.66
Overall value for money	4.05	4.03	3.73	4.03	3.84

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

Table 3.4.3: Quality of accommodation*Percentages*

Evaluation	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: All Visitors	73	240	615	38	966
Excellent	62	43	34	53	39
Good	26	33	40	24	37
Average	11	23	22	18	21
Not good enough	0	1	3	3	2
Poor	1	*	1	3	1
Average score ¹	4.47	4.17	4.02	4.21	4.10

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

2. * means less than 0.5%

Table 3.4.4: Quality of location*Percentages*

Evaluation	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: All Visitors	83	250	651	40	1024
Excellent	60	56	46	75	51
Good	25	32	40	18	36
Average	12	10	12	8	11
Not good enough	0	2	2	0	2
Poor	2	*	*	0	1
Average score ¹	4.41	4.42	4.28	4.67	4.34

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

2. * means less than 0.5%

Table 3.4.5: Quality of facilities*Percentages*

Evaluation	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: All Visitors	74	218	602	34	928
Excellent	41	33	25	44	29
Good	31	33	41	27	38
Average	22	28	29	29	28
Not good enough	4	3	5	0	4
Poor	3	3	1	0	2
Average score ¹	4.03	3.90	3.83	4.15	3.87

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

Table 3.4.6: Quality of decor*Percentages*

Evaluation	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: All Visitors	76	245	628	34	983
Excellent	41	33	24	47	28
Good	36	40	42	29	41
Average	17	22	26	21	24
Not good enough	4	3	6	3	5
Poor	3	2	1	0	1
Average score ¹	4.08	4.00	3.82	4.21	3.89

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

Table 3.4.7: Cleaning standard*Percentages*

Evaluation	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: All Visitors	74	208	504	38	824
Excellent	45	37	28	50	33
Good	34	36	43	26	40
Average	18	18	21	21	20
Not good enough	3	7	5	3	5
Poor	1	3	3	0	3
Average score¹	4.18	3.96	3.87	4.24	3.94

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

Table 3.4.8: Quality of food and beverages*Percentages*

Evaluation	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: All Visitors	61	156	339	37	593
Excellent	59	49	41	60	46
Good	21	33	35	19	32
Average	15	15	20	19	18
Not good enough	2	2	2	0	2
Poor	3	0	1	3	1
Average score¹	4.31	4.30	4.11	4.32	4.19

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

Table 3.4.9: Quality of service*Percentages*

Evaluation	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: All Visitors	73	203	483	35	794
Excellent	62	48	36	66	43
Good	26	28	41	31	36
Average	11	22	20	3	19
Not good enough	0	3	1	0	1
Poor	1	0	1	0	1
Average score¹	4.47	4.21	4.11	4.63	4.19

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

Table 3.4.10: Price level*Percentages*

Evaluation	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: All Visitors	76	225	611	31	943
Excellent	37	32	18	42	24
Good	26	31	30	29	30
Average	32	33	40	23	37
Not good enough	4	3	10	7	8
Poor	1	1	2	0	2
Average score¹	3.93	3.89	3.52	4.06	3.66

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

Table 3.4.11: Overall value for money*Percentages*

Evaluation	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year 1998
Base: All Visitors	79	231	630	36	976
Excellent	38	35	21	39	26
Good	33	38	40	31	39
Average	27	24	32	25	24
Not good enough	1	2	6	6	5
Poor	1	1	2	0	2
Average score¹	4.05	4.03	3.73	4.03	3.84

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

3.5 Visits to attractions

Visitors were presented with a long list of attractions on Bornholm. For ease of presentation the list of attractions has in this report been divided into four categories:

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

The tables below show whether the tourists had visited the different attractions on this trip or not. The percentages shown in the tables are estimates of the visitor market penetration rate of each listed attraction during the period January - December 1998.

Findings

3.5.1 Heritage attractions

As shown in Table 3.5.1, the significant heritage attraction for all visitors are Hammershus Castle which was also the case in 1996 and 1997. As would be expected, the visitors in the third quarter, which constitutes the bulk of the holiday season, have a higher propensity to visit heritage attractions than others. This should be seen in connection with many first time visitors in the third quarter.

3.5.2 Natural attractions

In 1996, 1997 and 1998 natural attractions are also of most significance to tourists in the third quarter.

The visitor market penetration rates of the natural attractions are lowest in the first quarter of 1998. Throughout the year Helligdomsklipperne is the most visited natural attraction. This is true of all quarters.

3.5.3 Museums

Museums are generally not well attended in the period July 1995 - December 1998, the only exception being the Bornholms Art Museum.

The visitors in the third and fourth quarter of 1998 are more likely to visit museums than others. It should be taken in consideration that most museums, except for the

Bornholms Art Museum and Bornholms Museum, close down at the end of October until mid-May.

3.5.4 Craft and other attractions

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

Some 46% of the total number of tourists in 1998 visited a smoke house and 41% visited a glass factory/shop.

3.5.5 Additional attractions visited

To ensure complete coverage, visitors were also asked to record other attractions they had been to and the following is a list of the features of Bornholm that were mentioned by fifteen or more respondents in 1998:

- Oluf Høst Museum
- Døndalen;
- Butterfly Park;
- Dueodde;
- Almindingen;
- Various markets/flea markets;
- Various towns.

Table 3.5.1: Visits to heritage attractions

Attraction	<i>Percentages</i>				
	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: All Visitors	223	451	915	103	1692
Hammershus Castle	16	35	55	22	43
Hammershus exhibition	2	8	25	14	17
Østerlars round church	9	28	41	23	32
Other churches	9	24	45	17	33

Table 3.5.2: Visits to natural attractions

Attraction	<i>Percentages</i>				
	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: All Visitors	223	451	915	103	1692
Christiansø	1	9	19	4	13
Gardens	4	7	21	12	15
Randkløve Skaar	1	3	13	0	8
Paradisbakkerne	3	12	34	13	23
Ekkodalen	4	17	29	10	21
Rytterknægten	2	17	30	14	22
Helligdomsklipperne	8	26	43	25	33
Jons Kapel	5	16	37	19	26

Table 3.5.3: Visits to museums*Percentages*

Museum	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year 1998
Base: All Visitors	223	451	915	103	1692
Bornholms Art Museum	4	10	19	12	14
Bornholms Museum	2	4	11	2	7
Gudhjem Museum	n/a ¹	2	8	0	5
Nexø Museum	n/a ¹	1	6	2	4
Martin Andersen Nexø Museum	n/a ¹	2	7	7	5
Defence Museum	n/a ¹	2	5	5	4
Quarry Museum	n/a ¹	4	9	19	8
Farm Museum	n/a ¹	3	10	15	8
Automobile Museum	n/a ¹	2	7	16	6
Erichsens Gaard	n/a ¹	3	8	2	6

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

2. ‘ means less than 0.5%

Table 3.5.4: Visits to craft and other attractions*Percentages*

Attraction	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year 1998
Base: All Visitors	223	451	915	103	1692
Glass factory/shop	8	29	57	26	41
Ceramic factory/shop	6	20	42	17	30
Art galleries	4	12	39	11	25
Brændesgårdshaven	n/a ¹	7	14	n/a ¹	11
Fish smoke house	4	36	63	27	46
Zoo	n/a ¹	2	13	0	9
A lighthouse	8	19	37	21	27

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

3.6 Activities undertaken by visitors

In addition to being asked about any trips to attractions, visitors were given a list of the common activities available on Bornholm and were asked about their participation in them. Activities were grouped into the following broad categories:

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

Findings

3.6.1 Water based activities

The most popular water based activities in 1998 were going to the beach and swimming in the sea (Table 3.6.1). This was also true of 1996 and 1997. Obviously there are differences between the quarters. The share who went to the beach in 1998 varied from 5% in the fourth quarter to 56% in the third. The share who went swimming in the sea varies from 0% in the fourth quarter to 38% in the third. This reflects the island's importance as a beach holiday destination. Swimming in a pool, and to some extent boat trips, were also popular in the third quarter of 1998.

3.6.2 Specific activities

To complement water activities such as wind surfing or fishing, visitors were asked whether they had played golf, gone to the trotting races or taken a scenic air flight (Table 3.6.2). Overall, participation in specific activities was relatively small in both 1996, 1997 and 1998. In the third quarter of 1998, covering the main holiday season, only 5% of the visitors participated in golf or trotting races and only 1% took a scenic air flight.

3.6.3 Entertainment activities

Many leisure tourists are compulsive shoppers, so it is not surprising that shopping is an important activity (Table 3.6.3). Throughout the year almost half of the visitors went shopping. In the third quarter 60% went shopping. Given that there is a considerable amount of self-catering amongst holidaymakers and there are many people on holiday who are visiting friends and relatives, eating out is also a popular form of entertainment. Some 40% of all the visitors to Bornholm in 1998 ate out during their stay. The share varies between 13% in the first quarter and 53% in the third quarter. Music recitals and going to the cinema were not important activities to the visitors neither in 1996, 1997 nor 1998.

3.6.4 General recreational activities

Commensurate with the image of Bornholm as a holiday island where life proceeds at a leisurely pace, Table 3.6.4 indicates that just relaxing and driving around are common general recreational activities. More than half of the visitors in the period 1996-1998 were just relaxing or driving around. Walks on my/our own and cycling were also significant in 1998, particularly for visitors in the third quarter.

3.6.5 Other activities

Other activities recorded by visitors in 1998, but only for small numbers, were horse riding, audience at rallies and participating in various sport arrangements. Some of these activities are related to the summer season only.

Table 3.6.1: Participation in water based activities

Activity	<i>Percentages</i>				
	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year 1998
Base: All Visitors	223	451	915	103	1692
Going to the beach	7	22	56	5	37
Swimming in the sea	*	5	38	0	22
Swimming in the pool	1	6	26	0	16
Wind surfing	4	*	2	0	2
Boat trips	n/a ¹	6	19	5	14
Fishing	2	3	6	2	4

Notes: 1. n/a - not available during the time in question
2. * means less than 0.5%

Table 3.6.2: Participation in specific activities*Percentages*

Activity	1 st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year 1998
Base: All Visitors	223	451	915	103	1692
Scenic air flight	0	1	1	0	1
Golf	1	1	5	0	3
Trotting races	0	1	5	0	3

Table 3.6.3: Participation in entertainment activities*Percentages*

Activity	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year 1998
Base: All Visitors	223	451	915	103	1692
Music recitals	*	2	10	0	6
Going to the cinema	2	1	1	0	1
Eating out	13	34	53	16	40
Shopping	29	39	60	36	49

Note: 1. * means less than 0.5%

Table 3.6.4: Participation in general recreational activities*Percentages*

Activity	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year 1998
Base: All Visitors	223	451	915	103	1692
Cycling	2	9	36	4	22
Guided coach tour	2	6	5	18	6
Guided walks	1	4	7	15	6
Walks on my/our own	12	27	47	26	36
Just relaxing	30	49	68	42	56
Driving around	29	47	66	34	54

3.7 Transport

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

Findings

3.7.1 Transport mode

By far the most popular mode of transport used for travelling about the island is the car (Table 3.7.1). This is true of both 1996, 1997 and 1998.

Almost 90% of all visitors in 1998 used a car as transport mode. The share varies from 74% in the fourth quarter to 91% in the third. In second place comes moving around the island on foot. It does not come as a surprise that a bicycle is, compared to the use of bicycle during the other quarters, most frequently used amongst the visitors in the third quarter.

Table 3.7.1: Transport mode*Percentages*

Transport	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year 1998
Base: All Visitors¹	207	423	855	74	1559
Public Bus	23	11	11	24	13
Coach Tour	3	8	4	16	6
Taxi	7	4	1	9	3
Car	90	87	91	74	89
Motorbike	0	0	1	0	1
Bicycle	16	19	34	15	27
On foot	36	41	52	34	46
Other	*	*	*	0	*

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

2. * means less than 0.5%.

3.8 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

3.8.1 Expenditure per person per trip

The expenditure per person per trip reflects the difference between lengths of stay. Visitors in the third quarter stay the longest on average (Table 3.1.8) and therefore tend to spend the most (Table 3.8.1). It is also the case that expenditure tends to be higher on a package tour, at an average of DKK 2 246 per person per trip, than for those travelling under their own arrangements, at an average of DKK 2 154 per person per trip. This reflects the fact that visitors on an inclusive tour are more likely to be using serviced accommodation rather than self-catering.

3.8.2 Expenditure per person per day

When comparisons are made on the basis of expenditure per person per day, those on an inclusive tour record the highest daily spending (Table 3.8.2). Visitors on an inclusive tour spend 334 DKK per person per day while visitors on an independent tour spend DKK 245 per person per day.

The level of the expenditure per person per trip and per person per trip per day has been the same in both 1996, 1997 and 1998.

Table 3.8.1: Expenditure per person per trip*DKK*

Country	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: All Visitors	163	328	743	52	1286
Independent	1 115	1 481	2 724	1 500	2 154
Inclusive	1 177	1 634	2 691	3 104	2 246
All	1 118	1 512	2 720	1 900	2 176

Table 3.8.2: Expenditure per person per day*DKK*

Country	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: All Visitors	163	328	743	52	1286
Independent	210	248	255	207	245
Inclusive	241	342	343	439	334
All	209	264	264	264	257

3.9 Bornholm as a visitor destination

In the final section of the questionnaire, visitors were asked about their overall impressions of Bornholm in terms of:

- Being a place to visit for holidays and recreation;
- Value for money;
- What they thought would improve the island as a tourist destination;
- Any particular likes or dislikes about Bornholm.

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

Findings

3.9.1 Place to visit for holiday and recreation

As a holiday destination, Bornholm is highly rated by all visitors, without exception in both 1996, 1997 and 1998.

The visitors in the second quarter of 1998 are most satisfied with Bornholm as a holiday destination while the visitors in the fourth quarter are less satisfied. Also when it comes to the question concerning value for money the visitors in the second quarter proved to be the most satisfied while the visitors in the third quarter are the least satisfied.

3.9.2 Likes about Bornholm

The most popular remarks on what visitors like about Bornholm in 1998 were:

- The landscape and nature;
- Local hospitality and friendliness.

3.9.3 Dislikes about Bornholm

When asking visitors in 1998 what they disliked about Bornholm, they tended to repeat the suggestions already made for improvements, save that the ranking, in terms

of significance, was changed. Top of their agenda for dislikes are lack of value for money and sign posting. Beyond this, there are a whole series of individual dislikes that relate to the personal experiences of the respondent. These latter comments serve to amplify the complex nature of the tourist purchase, which involves the visitor coming into contact with a great variety of people and places, so that a poor experience at one service encounter can colour the visitor's whole attitude to the destination.

3.9.4 Probability of returning

Table 3.9.3 examines the probability that visitors will return to Bornholm. Throughout the years 1996, 1997 and 1998 the visitors in the first quarter and the fourth quarter show the highest likelihood of returning. This has to be seen in connection with the main purpose of visit in those quarters. In both the first quarter and the fourth quarter many tourists come the island to visit friends and relatives or to combine holiday with visiting friends and relatives.

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

3.9.5 Possible time of return

With respect to the timings of a return trip to Bornholm, visitors were asked in a staged process, from 'This year' up to the 'Next five years', when they were likely to come back to the island. The results are shown in Table 3.9.4. There are possibilities of multiple answers here, in that the same respondent could be coming back several times within the time frame given. The answers reported are those saying 'Certain' or 'Likely' only. It should be noticed that the difference between the number of visitors saying they will be back this year in the four quarters is caused to some extent by the time of the year the interview took place, hence coming during the fourth quarter one would be less inclined to return the very same year than the visitors in the first quarter and the second quarter.

Table 3.9.1: Bornholm as a holiday destination

Evaluation	<i>Percentages</i>				
	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: All Visitors	193	400	800	67	1460
Excellent	70	78	68	66	71
Good	26	19	25	25	23
Average	3	3	6	8	5
Not good enough	0	0	*	0	*
Poor	1	0	*	2	*
Average score²	4.65	4.75	4.61	4.55	4.65

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

Table 3.9.2: Value for money*Percentages*

Evaluation	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: All Visitors	152	352	709	53	1266
Excellent	30	39	23	38	29
Good	34	34	33	34	33
Average	31	24	35	23	31
Not good enough	4	3	8	2	6
Poor	1	1	1	4	1
Average score ¹	3.87	4.07	3.70	4.00	3.84

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

Table 3.9.3: Probability of returning*Percentages*

Probability	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: All Visitors	199	400	810	69	1478
Certain	69	52	33	59	44
Likely	20	21	28	23	25
Maybe	10	21	30	10	24
Unlikely	2	6	8	7	7
Certainly not	1	*	1	0	1

Note: 1. * means less than 0.5%

Table 3.9.4: Timing of return by country*Percentages*

Timing¹	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: All Visitors	153	228	656	40	1077
This year	91	71	39	65	54
Next year	80	67	59	88	65
Next 2 years	80	61	29	81	45
Next 5 years	81	57	24	84	41

Note: 1. The answers refer to 'Certain' and 'Likely' only as a percentages of all respondents.

4. Bornholm residents

This part of the report covers the Bornholm residents leaving Bornholm by ferry in the period January - December 1998. The residents answered a number of questions in the screening procedure concerning their border destination, purpose of trip and party size.

4.1 Characteristics of Bornholm residents

Findings

4.1.1 Border destination

In both 1996, 1997 and 1998 more than 60% of the residents stated their destination as somewhere in Denmark and more than one fifth mentioned somewhere in Sweden (Table 4.1.1). While looking at the quarters it appears that Denmark as a destination is most noticeable in the second and third quarter.

In 1998 respectively 71% and 69% of the residents had some place in Denmark as their destination in the second and third quarter of 1998. In the first and fourth quarter relatively many of the residents were leaving to a destination in Sweden. This reflects the many one day trips around Christmas time (Table 3.1.8 and Table 4.1.2).

4.1.2 Purpose of trip

Table 4.1.2 shows purpose of trip among residents in 1998. The main purpose for the residents was day trip followed by holiday and visiting friends and relatives. There are some differences between the quarters. As mentioned above day trips were very popular in the first and fourth quarter while 'holiday' and 'VFR solely' were the dominant purposes in the second and third quarter.

4.1.3 Party size

Party size analysis is shown in Table 4.1.3. In the first six month of 1998 some 43% of the residents were travelling alone. Among the residents in the third and fourth quarter respectively 34% and 25% were travelling alone. In the fourth quarter of 1998 some 44% mentioned a party size consisting of two persons. Overall, average party size was 2.67 persons. The party size was lowest in the first quarter and highest in the second and third quarter. This was also the case in 1996 and 1997.

Table 4.1.1: Residents by border destination

Destination	<i>Percentages</i>				
	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year
Base: Residents	375	349	229	335	1288
Denmark	62	71	69	51	63
Sweden	29	18	21	37	27
Germany	6	4	5	7	6
Norway	1	1	*	1	1
Others	2	6	5	4	4

Note: 1. * means less than 0.5%

Table 4.1.2: Residents by purpose

Percentages

Purpose	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year 1998
Base: Residents	388	361	219	344	1312
Business conference/ meeting/exhibition	2	4	5	3	3
General business	16	6	7	5	9
Holiday	9	24	20	6	14
Holiday/VFR	13	11	7	8	10
VFR solely	9	23	21	7	14
Sporting event	1	1	1	0	1
Education	5	2	1	1	2
Hospital	3	3	2	2	3
Are here on leave	9	6	4	3	6
Party	4	5	12	24	11
Day Visit	23	11	6	31	19
Other ¹ (including above combinations)	6	4	14	10	8

Note: 1. Including wedding, party, funeral etc.

Table 4.1.3: Residents by party size

Percentages

Party Size	1st Qtr 1998	2nd Qtr 1998	3rd Qtr 1998	4th Qtr 1998	All Year 1998
Base: Residents	397	362	232	345	1336
1	45	41	34	25	37
2	34	31	36	44	36
3	8	9	10	11	9
4	6	9	12	12	9
5	2	3	4	4	3
6	2	1	*	1	1
More than 6	3	6	4	3	4
Average (persons)	2.30	3.13	2.67	2.60	2.67

Note: 1. * means less than 0.5%.

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