

Danish University Colleges

Survey of Visitors to Bornholm 2001

January - December 2001

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Publication date:
2002

Document Version
Publisher's PDF, also known as Version of record

[Link to publication](#)

Citation for pulished version (APA):

Hartl, A., & Rassing, C. (2002). *Survey of Visitors to Bornholm 2001: January - December 2001*. Center for Regional og Turisdeforskning.

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Working paper nr. 13

Survey of Visitors to Bornholm

January - December 2001

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ISBN: 87-90881-69-9

ISSN: 1396-4895

Preface

Leisure tourism on Bornholm is not a new phenomenon. It began in the 1860s and gained momentum after the establishment of regular summer steamship links to the island from Copenhagen, Sweden and Germany towards the end of the last century. These links established the pattern of visitor flows that are present to this day, in that the core markets for the tourist product of the island are still domestic visitors from the rest of Denmark and overseas visitors from Germany, Sweden and, to a lesser extent, Norway.

Apart from records of overnight stays and passenger traffic kept by Denmark's Statistic, BornholmsTrafikken and Bornholms Airport, and evidence from national surveys commissioned by the Danish Tourist Board, there has been very little market research concerning visitors to the island. Earlier studies have been:

- *Tourist Analysis Bornholm 1969*: self-completion returnable postcard survey undertaken from 30 March to 4 October 1969, to obtain information on visitor profiles and levels of satisfaction (Bornholms Turistforening, 1970). The sample size achieved was 22,035;
- *Tourist Analysis Bornholm 1976*: survey carried out by the county of Bornholm (Bornholms Amtskommune, 1976);
- *Bornholm as a Holiday Destination for German Tourists*: a source market survey carried out during the months of June and July 1993 (FORSA, 1993). The sample size was 6,043 German people above 14 years of age;
- *Summer House Project Bornholm*: a survey of 2,047 holiday cottage users with the primary purpose of assessing the quality of summer house provision (Hasløv and Kjærsgaard I/S, 1995).

In July 1995 the Research Centre of Bornholm (now: Centre for Regional and Tourism Research) began conducting a survey among visitors to Bornholm. The survey is being conducted in order to assess the nature of tourism demand in peripheral areas, using Bornholm as a case example for the purposes of fieldwork. During the first year people arriving and departing by ferry and plane were interviewed. Since July 1996 only people departing by ferry have been interviewed.

The overall objective is to provide a comprehensive description of visitors to Bornholm that was in keeping with the standard analysis of destination surveys. Because the survey has been conducted for six and a half year (since July 1995) the data can also disclose trends in visitor patterns.

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

Peter Billing
Majl 2002

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1. Executive summary in Danish

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

Besøgende:

- I 2001 modtog Bornholm totalt set 557.000 besøgende, der tegnede sig for 4,3 mio. overnatninger. Beregningerne omfatter ferierejsende, forretningsrejsende, besøgende til familie/venner, mv. Antallet af såvel besøgende som overnatninger er det højeste i den observerede periode.
- Hovedmarkederne for Bornholm er særligt det øvrige Danmark men også Tyskland og Sverige.
- Over tre fjerdedele af de besøgende til Bornholm har været på øen før.
- Størstedelen af de besøgende er ferierejsende, og selskabet består typisk af par eller familier med små børn.
- Det gennemsnitlige ophold er på godt en uges varighed, med faldende tendens.
- Hovedårsagerne for at vælge Bornholm som feriedestination er på grund af natur, atmosfære og landskab.
- Anvendelsen af Internettet i forbindelse med booking af transport og overnatning er steget i forhold til år 2000.
- Der er generelt stor tilfredshed med forskellige aspekter vedrørende overnatningsudbuddet på øen.
- Knap 95% af de rejsende anvender bil (egen, lånt eller lejet) som transportmiddel under opholdet.
- En gennemsnitsbesøgende bruger i alt omkring DKK 2.300 på sin tur til Bornholm inklusive transport til og fra øen. Dette svarer til cirka DKK 330 i døgnet.
- Overordnet set er de besøgende tilfredse med Bornholm som feriedestination. Også når det gælder valuta for pengene er tilfredsheden forholdsvis høj, dog lavere end den generelle tilfredshed.

Fastboende:

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

2. Survey design

2.1. The composition of the report

The report is divided into four chapters. This first chapter provides the reader with some general background information about the survey design. In the second chapter the collected data are used to estimate the number of visitors and visitor nights in the years 1996 - 2001. The method and the results are presented numeric as well as graphic. The third section describes the visitors departing Bornholm by ferry in the period January - December 2001. The questions are asked partly to assess whether the sample is representative of known characteristics of visitors from other sources and partly to be able to analyse the results by key variables. Bornholm residents are filtered through a screening process, but are asked some supplementary questions. The findings of these are described in chapter four. Throughout the report comparisons with previous years will be made when appropriate.

2.2. Survey methodology

Enclosed, as Appendix 2 is the questionnaire concerning sea departures used during the period of January - June 2001. In Appendix 3 the revised questionnaire that was used from July - December 2001 is shown. In the middle of 2001, the questionnaire went through an extensive tidying-up operation. Some answer categories did no longer seem relevant and thus were removed from the questionnaire to reduce the length of the questionnaire, partly because the decreased travel time on the fast ferry gave the respondents less time for filling in a questionnaire of up to 6 pages. However, this prevents the reader from comparing the results with corresponding results from previous years directly. The tidying-up process, on the other hand gave the respondents more time to answer the remaining questions and made room for adding trailer questions of relevance whenever suitable. This relates amongst other places in the report to Table 4-15, Table 4-32, Table 4-33, Table 4-37 and Table 4-38.

The questionnaires are available in four different languages (Danish, Swedish, German and English). Interviewing arrangements are structured so as to guarantee representative data on a quarterly basis (at a minimum, every day of the week and each week in any one month for every quarter of the year is surveyed). This is done so as to ensure that no systematic bias can arise in the quarterly reporting of information. Contacts are only adults, using as the definition 16 years of age and upwards.

Interviewing is carried out at the main points of exit and departure so that data collection take place on ferry departures to Copenhagen, Ystad (Sweden) and Sassnitz (Germany). Cost dictate that respondents are introduced to the questionnaire and thereafter complete it themselves, with interviewers on hand to deal with any issues that may arise.

The limited number of source markets for Bornholm indicates that the working sample size need not be large. But the paucity of information about visitors to the island commends a strategy of over-sampling so as to ensure results that are robust. A pilot questionnaire was run among tourists visiting the island by ferry in early June 1995 with a sample of 50 respondents. A target of 3,000 visitor contacts (departures) per year was set with a screen questionnaire to filter out local residents. It is anticipated that the chosen method of interviewing can lead to some wastage in the form of unusable returns, but this is accommodated within the target.

The questionnaire is structured to include the following as objectives of the enquiry:

- Demographics: the profile and characteristics of visitors;
- Communication: awareness and influences on the decision to visit;
- Behaviour: what visitors do on the islands;
- Attitudes: what visitors think about their experiences on Bornholm;
- Expenditure: how much visitors spend on the island.

2.3. The year 2001

This report covers a representative sample of the visitors and residents departing Bornholm by ferry in the period 1 January - 31 December 2001. During the summer of 2000 a new fixed link (tunnel and bridge, termed Øresundsbron) between Denmark and Sweden was opened and a fast ferry connection between

Ystad (Sweden) and Rønne (Bornholm) was taken into use in May. This means that the travel time between Rønne and Copenhagen is almost halved from 5-6 hours down to 2-3 hours. The effect of the change on the number of visitors is illustrated in Table 3-1.

The frequency tables in this report are based on the statistics shown in Table 2-1. Over the year 3,340 visitor questionnaires were collected, with a wastage rate of just below 5% together with 1,350 screen responses containing basic information about trip movements of the residents of Bornholm. Overall, 71% of the sample was visitors. Some 51% of the contacts were male and 49% female.

Table 2-1: Sample (departing by ferry)

	1st Qtr 2001 894		2nd Qtr 2001 707		3rd Qtr 2001 2,307		4th Qtr 2001 782		All Year 4,690	
	Base	%	Base	%	Base	%	Base	%	Base	%
Visitors	413	46	484	69	1,997	87	336	57	3,340	71
Residents	481	54	223	31	310	13	446	43	1,350	29

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

2.4. Acknowledgements

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

During 2001, two interviewers, Kiss Knak and Santa Vizuele, were involved in collecting data. Johnny Rassing has been responsible for the daily data processing, mainly the frequency control of the database. Charlotte Rassing was responsible for the detailed data control, made the tables in the report and took care also of the overall planning of schedules.

3. Number of visitors and visitors nights

The Centre for Regional and Tourism Research (CRT) 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:¹

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

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

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

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

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

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

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

The *total number of visitor nights* on Bornholm can be calculated as:

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

Table 3-1 shows the results of the calculations.

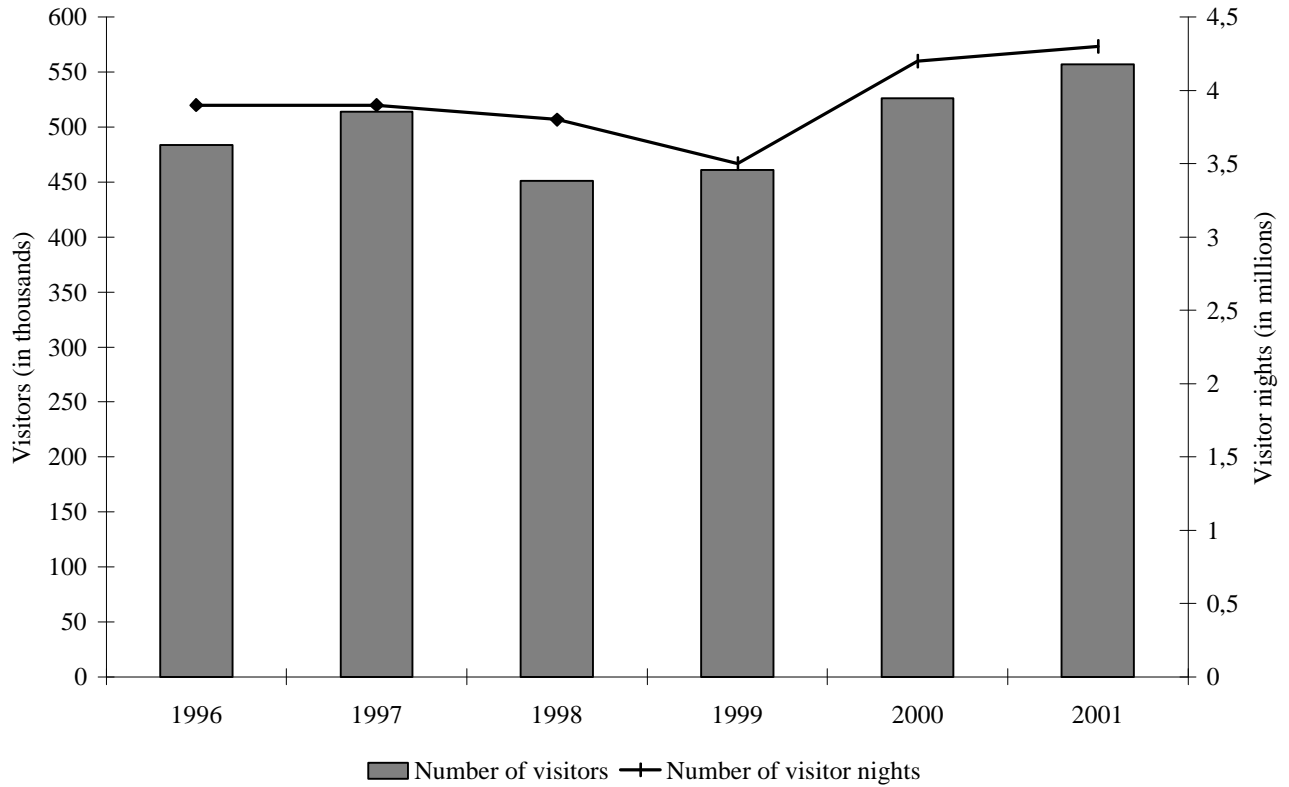
Table 3-1: Number of visitors and visitor nights (in thousands)

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

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

In the period 1996 to 1998 the total number of visitor nights on Bornholm was about the same level. In 1999 the number of visitor nights declined but in 2000 and again in 2001 the number went up.

Figure 3-1: Number of visitors and visitor nights



A fast ferry connection between Rønne and Ystad started operating in the summer of 2000 and the fixed link (bridge and tunnel) between Denmark and Sweden opened for traffic on 1 July 2000. Thereby travel time between Copenhagen and Rønne was reduced from 5-6 hours to 2½-3 hours. The impact on the number of visitors was obvious for the year 2000. Again in year 2001 the visitor number increased, now to 557,000, which is the highest level in the period observed.

Overall Bornholm experienced an increase in the number of visitors as well as visitor nights in 2001. Especially the increase in the number of visitors was expected as a consequence of the transportation facilities.

4. Profile and characteristics of visitors

In this section of the report the data collected among visitors leaving Bornholm by ferry in the period January - December 2001 are reported. Where appropriate, comparisons with previous years will be made.

4.1. Profile and characteristics of visitors

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

Findings

4.1.1. Key markets

Comparing the results from the third quarter of 2001 with the results from the summer of 1969, the summer of 1976 and the third quarter of 1995-2000 it becomes evident that the key markets for Bornholm have not changed. The key markets are still the rest of Denmark, Germany and to some extent Sweden. This is true for the second and third quarter of 2001 (Table 4-1). In the first and fourth quarter of the year the Swedes only counted for about 4% of the total number of visitors. This is the lowest level observed since the data collection began in July 1995.

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

During the year 2001 the share of Danes varies between 57% in the second quarter to 85% in the fourth quarter as a result of the many people travelling to visit friends and relatives on Bornholm for the Christmas holidays.

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

4.1.2. Type of visit

About 77% of the visitors interviewed during the year 2001 had been to Bornholm before (Table 4-2). A tendency that already prevailed in the period 1996 to 2000. More than three quarters of the repeat visitors in 2001 were from Denmark. Visitors from Germany account for 14% of the repeat visitors while Swedes account for 9%. In total the key markets for Bornholm (Denmark, Germany and Sweden) account for 95% of the repeat visitors to the island. Clearly, Bornholm has a regular repeat following, with strong loyalty to the product. This fact is illustrated in Table 4-3 and Table 4-4.

Overall, about 40% of the visitors to Bornholm in 2001 have visited the island more than ten times before. In the first and fourth quarter about 45% state that they had visited the island more than 20 times before. Throughout year 2001 more than half of the visitors had been to Bornholm more than 5 times before. The share increased to above 70% in the fourth quarter. This pattern was the same during the period from 1996 to 2000 and is closely related to the many tourists visiting friends and relatives around Christmas time.

Some 29% of the repeat visitors in 2001 were back for at least the second time in the current year (Table 4-4). The time of year for the interview is reflected in the variations in the different quarters. In the fourth quarter some 62% state that they had been to Bornholm *earlier this year* compared to 26% in the first quarter.

4.1.3. Purpose of visit

It is no surprise that the majority of the people visiting Bornholm during 2001 were on holiday (Table 4-5). There are some variations during the year. In the first quarter many visitors are on a business trip, visiting friends and relatives or combining holiday with a visit to friends and relatives. In the second and third quarter the majority of the visitors come to Bornholm for holiday purposes. In the fourth quarter holiday, holiday combined with a stay at friends and relatives' and solely visiting friends and relatives are the dominant purposes for the visit to the island.

Overall, 53% of visitors in year 2001 state the main purpose of their trip to Bornholm as *holiday*. This is the lowest number observed until now and just below the level of 2000 and 1999. In 1996, 1997 and 1998 the corresponding shares were respectively 59%, 67% and 61%.

4.1.4. Party composition and party size

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

Some differences in the average party size throughout the year can be observed. Typically average party size is higher during the second and third quarter when families travel together on holiday. In this period average party size in 2001 is 3.1 while the average party size in the first and fourth quarter is below 2.5 persons. It should be noticed that there is some discontinuity between the answers to party composition and recorded personal party size in the tables. This arises from the fact that party size has an economic connotation: individuals could be travelling with someone, yet economically just paying for themselves.

4.1.5. Length of stay

During the year 2001 visitors to Bornholm stayed on average for 7.3 days. The average length of stay varies between the different quarters from 6.0 in the first quarter to 8.1 in the third quarter, which covers the peak season (Table 4-8). The average length of stay during 2001 is below the level in the period observed from 1996 - 2000.

In the first and fourth quarter of 2001 almost half of the visitors to the island stayed for less than four days. In the second half, almost one quarter of the visitors to Bornholm stayed for less than four days. This is at the same level as in 2000. The corresponding share in the second half of 1999 was 19%, in 1998 it was 14%, in 1997 it was 13% and in 1996 the share was 11%. This indicates that the improved transport conditions have caused the increase in the short break market, a development that had been anticipated.

4.1.6. Socio-economic characteristics

Occupational characteristics of respondents in the period July 1995 - December 2001 are principally professional, managerial and administrative (Table 4-9). This is reflected in the relatively high educational level among the visitors (Table 4-11). The age ranges mirror the results in respect of party composition, with couples at the top and bottom of the age spectrum and family groups in the middle (Table 4-12).

Table 4-1:Visitors by country of residence

Percentages

Country	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
Base: All Visitors	413	484	1,996	446	3,339
Denmark	82	57	59	85	65
Sweden	6	11	14	2	11
Germany	10	29	21	10	20
Norway	1	1	4	1	2
Others	1	2	2	2	2

Note: * means less than 0.5%

Table 4-2: Visitors by type of visit

Percentages

Visit	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
Base: All Visitors	404	458	1,951	419	3,232
First	9	25	29	8	23
Repeat	91	75	71	92	77

Table 4-3: Visitors by number of visits

Percentages

Previous Visits	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
Base: Repeat Visit	349	323	1,334	372	2,378
1	6	12	19	5	14
2	9	14	15	8	13
3	6	12	10	7	9
4	6	5	7	4	6
5	5	5	5	5	5
6-10	14	13	12	14	13
11-20	10	12	13	11	11
More than 20	44	27	19	46	29

Table 4-4: Visitors by last visit

Percentages

Last Visit	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
Base: Repeat Visit	356	339	1,359	380	2,434
Earlier this year	26	25	21	62	29
Last year	50	29	21	10	25
Within last 2 years	7	11	10	8	10
Within last 5 years	7	11	14	5	11
More than 5 year	10	24	34	15	25

Table 4-5: Visitors by purpose

Percentages

Purpose	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
Base: All Visitors	401	466	1,936	417	3,220
Business or other work	26	10	3	13	8
Holiday	14	57	67	26	53
Holiday/VFR	22	16	19	24	19
VFR solely	23	10	4	26	10
Sport event	1	*	1	*	1
Education	1	1	*	1	1
Cultural event	1	3	1	*	1
Other (including above combinations)	12	3	5	10	7

Note: 1. * means less than 0.5%

Table 4-6: Visitors by party composition

Percentages

Party Composition	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
Base: All Visitors	400	465	1,938	415	3,218
Travelling alone	44	19	7	24	16
Husband/wife/partners only	19	31	35	27	31
Family group: children under 15	10	16	28	21	23
Family group: children grown up	6	5	7	6	6
Family group/relations	4	6	5	7	5
Friend/friends	8	9	7	5	7
Other	9	14	11	10	12

Table 4-7: Visitors by party size

Percentages

Party Size	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
Base: All Visitors	413	484	1,996	446	3,339
1	48	23	12	31	20
2	28	40	41	34	38
3	11	10	13	12	12
4	7	14	20	12	16
5	3	5	8	5	7
More than 5	3	8	6	6	7
Average (persons)	2.2	3.2	3.1	2.5	2.9

Table 4-8: Visitors by length of stay

Percentages

Period	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
Base: All Visitors	403	468	1,942	416	3,229
Day visit	14	9	6	11	8
Short stay ¹	37	20	14	33	20
Up to one week	35	44	45	48	44
One - two weeks	11	22	27	7	22
Two - three weeks	1	3	6	0	4
More than three weeks	2	2	2	1	2
Average (days)	6.0	7.3	8.1	5.1	7.3

Note: 1. Up to three days.

Table 4-9: Respondents' occupation

Percentages

Occupation	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
Base: All Visitors	310	329	1,637	340	2,616
Self-employed	9	6	6	7	6
Professional and managerial	25	11	20	23	20
Administrative	24	31	29	29	29
Clerical	6	7	7	4	7
Skilled wage earner	19	15	18	17	18
Unskilled wage earner	1	1	1	*	1
Assisting spouse	0	0	*	*	*
Retired	7	23	12	13	12
Student	7	5	6	5	6
Economically inactive ¹	2	1	1	2	1

Notes: 1. Includes unemployed and home workers.

2. * means less than 0.5%.

Table 4-10: Spouses' occupation

Occupation	<i>Percentages</i>				
	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
Base: All Visitors	149	206	1,684	354	2,719
Self-employed	5	5	6	8	6
Professional and managerial	8	9	15	21	15
Administrative	28	30	29	26	29
Clerical	20	8	8	11	9
Skilled wage earner	21	12	22	17	20
Unskilled wage earner	1	2	1	1	1
Assisting spouse	1	1	1	0	1
Employment not specified	0	1	0	0	*
Retired	9	23	10	13	12
Student	6	4	4	2	4
Economically inactive ¹	1	5	4	1	3

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

Table 4-11: Respondents' education

Education	<i>Percentages</i>				
	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
Base: All Visitors	323	358	1,684	354	2,719
Up to 9 years	19	19	14	13	15
9 - 12 years	27	23	25	22	25
12 years + vocational	32	30	33	36	33
12 years + academic	23	28	28	29	27

Table 4-12: Respondents' age

Age	<i>Percentages</i>				
	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
Base: All Visitors	357	402	1,842	384	2,985
16 - 24 years	9	4	5	5	5
25 - 34 years	24	13	16	16	16
35 - 49 years	32	31	38	43	37
50 - 59 years	25	22	23	21	23
60 - 69 years	8	22	13	14	14
Over 69 years	2	8	5	2	5

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

Family Income	<i>Percentages</i>				
	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
Base: All Visitors	304	343	1,612	342	2,601
Less than 200,000 DKK	21	19	13	11	14
200,000 - 400,000 DKK	35	43	38	36	38
400,000 - 700,000 DKK	31	27	37	39	35
Greater than 700,000 DKK	13	11	12	14	13

4.2. Awareness and influences on the decision to visit Bornholm

Visitors were asked about the extent of their awareness of and how they found out about Bornholm. An important feature of this is school travel, which was made an integral part of the Danish school system in 1953. The contrasting geography of the island in relation to the rest of Denmark has made it a notable destination for school trips, hence visitors were first asked whether they had been to the island when they were children. Questions were then put to ascertain the visitor's information sources concerning Bornholm and how significant were the different aspects of Bornholm in influencing their decision to take their holiday on the island.

Findings

4.2.1. Visit to Bornholm as a child

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

About 15% of the visitors to Bornholm in 2001 had visited the island before with their school. Overall, 48% of the visitors in 2001 had been to the island as a child. This is the same share as in 2000. The share of visitors in 2001, who had been to Bornholm as a child varies between 66% in the fourth quarter and 39% in the third quarter. This of course has to do with the composition of the visitors' nationality throughout the year.

4.2.2. Source of information

In asking holiday visitors how they found out about Bornholm, it is common with this type of question that those who have been before or cannot recall exact sources, will tend to attribute this knowledge to *always known*. Add to this the importance of *recommended by family/friends* and *family/friends on the island* and the majority of the respondents are covered (Table 4-15). What then matters are the remaining means of communication, and here guide books/brochures seem to be the most important items. Please note that this question was affected by the changes made in the questionnaire during 2001.

4.2.3. Attractiveness of Bornholm as a destination

Using a Likert preference scale whereby a score of 4 stands for *very important* and 1 for *unimportant*, visitors were asked to rank the significance of different components that make up the attractiveness of the Bornholm tourist product (Table 4-16). The highest scores in the surveyed period July 1995 - December 2001 have been achieved by general features such as the nature, atmosphere and landscape, and the lowest in specific activities such as fishing and golf courses.

Throughout 2001 some 62% evaluate the nature on the island as very important for their decision to visit; only 4% mention golf courses as very important. The tendency is reflected in all quarters of 2001.

Other aspects of Bornholm that are considered very important by the visitors in 2001 and which are solicited in an open-ended question, are, in order of importance:

- Own holiday cottage on the island;
- Favourable position/easy to get to;
- Going home/acquainted with local conditions.

Table 4-14: Visited as a child

As child	<i>Percentages</i>				
	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year 3,129
Base: Repeat Visits	385	441	1,899	404	
No	42	61	56	34	52
Lived on Bornholm as a child	16	5	6	18	7
With family/friends	12	12	11	13	12
With/visit family/friends	2	2	2	5	3
With school	17	10	15	16	15
With club/association	1	1	1	1	1
With above combinations	10	9	9	13	10

Table 4-15: Finding out about Bornholm

Percentages

Information Source	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year 2001
Base: All Visitors	413	481	1,997	446	3,219
Always known	50	42	51	50	51
Family/friends on Bornholm	37	24	18	38	25
Newspaper/magazine ad.	4	5	-	-	-
Poster	3	3	-	-	-
Newspaper/magazine article	5	6	-	-	-
Travel agent	1	4	-	-	-
Club/association	2	5	-	-	-
Military	4	2	-	-	-
Recommended by family/friends	16	26	28	10	25
Guide book/brochure	4	10	15	8	12
TV ad. or programme	3	3	-	-	-
Radio	1	1	-	-	-
Internet	0	3	7	3	5
Other	8	8	2	2	4

Notes: 1. Percentages can add up to more than 100% because of multiple choices.
2. "-" indicates that this answer choice was removed from the questionnaire.

Table 4-16: Aspects of Bornholm

Scores / Rank

Evaluation	1st Qtr 2001		2nd Qtr 2001		3rd Qtr 2001		4th Qtr 2001		All Year 2001	
	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank
Base: All Visitors	262		345		1,740		315		2,662	
Family/friends on Bornholm	3.13	2	2.44	8	2.07	12	3.11	4	2.39	9
Beaches	2.64	5	2.83	5	2.91	5	2.50	8	2.82	5
Landscape	3.07	3	3.60	2	3.44	3	3.27	2	3.40	3
Cycle routes	2.25	8	2.37	9	2.31	11	2.08	12	2.28	12
Walking	2.37	7	2.75	6	2.50	7	2.57	7	2.53	7
Fishing towns	2.67	4	3.13	4	3.06	4	2.88	5	3.01	4
Nature	3.18	1	3.66	1	3.54	1	3.39	1	3.50	1
Golf courses	1.30	13	1.29	13	1.24	14	1.24	14	1.25	14
Fishing	1.64	12	1.55	12	1.37	13	1.45	13	1.43	13
Cultural history	2.38	6	2.75	6	2.73	6	2.62	6	2.68	6
Restaurants	2.20	9	2.32	11	2.39	10	2.12	11	2.33	10
Craft/art workers	2.13	10	2.58	7	2.40	8	2.38	9	2.40	8
Atmosphere	3.07	3	3.44	3	3.48	2	3.22	3	3.41	2
Variety of activities	1.98	11	2.33	10	2.49	8	2.14	10	2.31	11

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

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

Percentages

Features	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year 2001
Base: Holidaymakers	262	345	1,740	315	2,662
Friends/family on Bornholm	62	39	28	60	38
Beaches	31	31	32	21	30
Landscape	46	65	54	53	36
Cycle routes	19	21	22	13	20
Walking	17	28	18	24	20
Fishing towns	25	36	32	33	32
Nature	51	72	62	63	62
Golf courses	4	6	4	4	4
Fishing	10	9	4	5	5
Cultural history	14	21	18	16	18
Restaurants	9	13	11	7	11
Craft/art workers	11	18	11	11	12
Atmosphere	42	56	57	50	55
Variety of activities	7	13	13	11	12

4.3. Organisation of the visit

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

Findings

4.3.1. Booking arrangements

Overall, the visitors in 2001 report that they are most likely to book transport directly with the carrier (Table 4-18). Some 79% book directly with the carrier, which is above the level in 2000 and 1999 where the question was introduced. When it comes to accommodation booking arrangements almost half of the visitors book directly with the landlord/proprietor and 35% booked accommodation through a travel agent. Visitors using a travel agent tend to use one near their home. As can be seen from Table 4-18 visitors find it difficult to place only one mark concerning their booking of both transport and accommodation. An increasing number of visitors mark that they booked directly with the carrier by using the Internet.

There are some differences between the four quarters. Especially in the fourth quarter of 2001 many visitors stayed with friends and relatives meaning they did not have to book accommodation at all.

4.3.2. Tourist information centre usage

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

Not surprisingly the visitors in the third quarter are those, who use the tourist information network most extensively. The third quarter covers the major part of the tourist season on Bornholm, and is the quarter with the highest percentage of first time holidaymakers who are expected to have the greatest need for information.

Table 4-18: Booking arrangements

Information Centre	<i>Percentages</i>				
	1st Qtr 2001 298	2nd Qtr 2001 282	3rd Qtr 2001 1,348	4th Qtr 2001 322	All Year 2,250
Base: All Visitors					
Booked transport directly with the carrier	80	72	81	79	79
Booked transport through travel agent	26	43	46	33	42
Booked transport through the internet	15	21	32	27	28
Company took care of the transport booking	25	8	5	11	9
Family/friends booked transportation	11	11	10	16	11
Booked accommodation directly with the landlord	19	31	59	32	48
Booked accommodation through a travel agent	11	30	43	23	35
Booked accommodation through the internet	5	9	21	8	16
Staying with friends and relatives	58	38	46	75	52
Family/friends booked accommodation	6	6	10	11	9
Bought a package tour from a travel agent	5	18	27	10	21
Used a travel agent near home	13	20	20	11	18
Used a travel agent in Bornholm	6	14	15	8	13
Booked through holiday cottage booking agency on Bornholm	3	8	10	5	8
Booked holiday cottage through agency elsewhere	2	6	7	7	6
Travel with club/association	3	7	7	2	6

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

Table 4-19: Tourist information centre usage

Percentages

Information Centre	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year 2,425
Base: All Visitors	290	318	1,486	331	
Aakirkeby	1	4	4	3	5
Gudhjem	3	8	10	4	8
Hasle	2	4	5	1	4
Nexø-Dueodde	6	7	9	5	8
North Bornholm, Allinge	2	8	8	4	7
Rønne, Velkomstcenter	6	13	14	7	12
Svaneke	4	3	6	3	5

4.4. Accommodation usage and evaluation

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

Findings

4.4.1. Type of accommodation

In the first and fourth quarter of 2001 almost half of the visitors preferred staying with friends and relatives as type of accommodation (Table 4-20). Conversely, in the second and third quarter holiday cottages are a preferred choice when visitors choose their place of stay. Looking at the year altogether, hotels together with holiday cottages and staying with friends and relatives account for more than three quarters of the visitors' choice of accommodation. This distribution of accommodation usage was the overall tendency throughout the period surveyed.

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

Appendix 1).

4.4.2. Evaluation of accommodation

Table 4-21 presents an evaluation by all visitors of their place of accommodation in 2001, covering nine aspects:

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

Overall, the average scores on the quality of physical accommodation, location, food/beverages and service were high, which was also the case in the previous years. However, there is some concern on the price level. This is reflected in the overall value for money score, which links quality to price. This concern has been expressed throughout the whole period 1996-2001.

Also, throughout the period 1996-2001, particularly scores during the third quarter are below the annual averages for the year and this has a clear effect on the annual scores.

Table 4-22 to Table 4-30 examine the different aspects of the visitors' perceptions of their place of stay by quarters of 2001. Overall, the tourists in the second quarter are the most satisfied with all aspects of their accommodation.

Table 4-20: Accommodation usage

Percentages

Accommodation	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
Base: All Staying Visitors ¹	339	420	1,871	362	2,992
Hotel	22	24	22	14	21
B & B/Private Home	1	2	1	2	1
Farmhouse	1	1	1	1	1
Youth Hostel	1	3	4	0	3
Holiday Centre	1	5	6	2	5
Friends and Relatives	50	27	18	49	27
Holiday cottage	13	26	30	30	28
Camping	0	4	11	1	7
Caravan	0	1	5	0	3
Other	10	8	2	3	4

Note: 1. The base includes multiple accommodation use.

Table 4-21: Evaluation of accommodation

Average scores

Evaluation	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
Base: All Visitors	262	345	1,740	315	2,662
Accommodation	4.14	4.27	4.07	4.15	4.12
Location	4.26	4.49	4.40	4.39	4.40
Facilities	3.78	4.05	3.85	4.01	3.88
Décor	3.83	4.06	3.87	4.02	3.91
Cleaning Standard	4.03	4.00	3.87	3.96	3.90
Food and beverages	4.13	4.22	4.06	4.24	4.10
Service	4.14	4.28	4.11	4.10	4.13
Price level	3.82	3.92	3.61	3.80	3.68
Overall value for money	4.04	4.05	3.81	3.89	3.87

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

Table 4-22: Quality of accommodation

Percentages

Evaluation	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
Base: All Visitors	112	258	1,221	129	1,720
Excellent	39	43	34	43	37
Good	39	44	43	34	42
Average	20	12	20	20	19
Not good enough	2	1	2	2	2
Poor	0	1	1	2	1
Average score ¹	4.14	4.27	4.08	4.15	4.12

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

Table 4-23: Quality of location

Percentages

Evaluation	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4 th Qtr 2001	All Year
Base: All Visitors	110	255	1,254	136	1,755
Excellent	45	60	53	54	53
Good	38	32	36	32	35
Average	16	7	11	12	11
Not good enough	1	1	1	1	1
Poor	0	*	*	1	*
Average score ¹	4.26	4.49	4.40	4.39	4.40

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

2. * means less than 0.5%.

Table 4-24: Quality of facilities

Percentages

Evaluation	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
------------	-----------------	-----------------	-----------------	-----------------	-------------

Base: All Visitors	108	236	1,173	123	1,640
Excellent	24	31	25	31	26
Good	36	45	40	42	41
Average	35	20	30	26	29
Not good enough	3	3	3	1	3
Poor	2	*	1	1	1
Average score ¹	3.78	4.05	3.85	4.01	3.88

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

Table 4-25: Quality of décor

Percentages

Evaluation	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
Base: All Visitors	106	245	1,205	130	1,686
Excellent	26	31	27	33	28
Good	39	48	39	40	41
Average	30	18	29	23	27
Not good enough	5	2	4	3	4
Poor	1	1	1	1	1
Average score ¹	3.83	4.06	3.87	4.02	3.91

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

Table 4-26: Cleaning standard

Percentages

Evaluation	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
Base: All Visitors	98	211	1,090	120	1,519
Excellent	30	30	29	35	30
Good	46	44	41	36	41
Average	24	22	21	23	22
Not good enough	0	4	6	2	5
Poor	1	1	3	4	3
Average score ¹	4.03	4.00	3.87	3.96	3.90

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

Table 4-27: Quality of food and beverages

Percentages

Evaluation	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
Base: All Visitors	83	171	832	89	1,175
Excellent	47	43	37	48	39
Good	24	39	38	35	37
Average	24	15	21	12	20
Not good enough	5	2	3	1	3
Poor	0	1	1	3	1
Average score ¹	4.13	4.22	4.06	4.24	4.10

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

Table 4-28: Quality of service

Percentages

Evaluation	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
Base: All Visitors	108	225	1,132	122	1,587
Excellent	38	48	38	39	40
Good	40	36	39	38	39
Average	20	12	20	19	18
Not good enough	2	3	3	2	3
Poor	0	1	1	3	1
Average score ¹	4.14	4.28	4.11	4.10	4.13

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

Table 4-29: Price level

Percentages

Evaluation	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
------------	-----------------	-----------------	-----------------	-----------------	-------------

Base: All Visitors	103	233	1,169	126	1,631
Excellent	23	29	21	31	23
Good	41	40	30	33	33
Average	31	27	39	25	36
Not good enough	4	4	9	10	8
Poor	1	1	2	2	1
Average score ¹	3.82	3.92	3.61	3.80	3.68

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

Table 4-30: Overall value for money

Evaluation	<i>Percentages</i>				
	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
Base: All Vi sitors	106	243	1,198	130	1,677
Excellent	36	31	26	29	27
Good	37	47	38	39	39
Average	25	19	31	26	28
Not good enough	1	2	5	5	4
Poor	2	1	1	1	1
Average score ¹	4.04	4.05	3.81	3.89	3.87

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

4.5. Visits to attractions

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

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

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

The tables below show whether the tourists had visited the different attractions on this trip or not. The percentages shown in the tables are estimates of the visitor market penetration rate of each listed attraction during the period January - December 2001.

Findings

4.5.1. Heritage attractions

As shown in Table 4-31, the significant heritage attraction for all visitors is Hammershus Castle, which was also the case in the previous years surveyed. As would be expected, the visitors in the third quarter, which constitute the bulk of the holiday season, have a high propensity to visit heritage attractions. This should be seen in connection with many first time holidaymakers in this quarter.

4.5.2. Natural attractions

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

The visitor market penetration rates of the natural attractions are lowest in the first quarter where Helligdomsklipperne, which is the most visited natural attraction, is only visited by 14%.

4.5.3. Museums

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

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

4.5.4. Craft and other attractions

Of the remaining attractions, glass blowing and visiting a fish smoke house are the most popular throughout the whole period surveyed. Both glass blowers and fish smoke houses are most frequently visited in the third quarter which again reflects the composition of the visitors to the island in the different quarters and the accessibility of the attractions. Around 64% of the total number of tourists in 2001 visited a smoke house and 57% visit a glass factory/shop.

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

4.5.5. Additional attractions visited

To ensure complete coverage, visitors were also asked to record other attractions they had been to and the following is a list of the features of Bornholm that were mentioned by fifteen or more respondents in 2001:

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

Table 4-31: Visits to heritage attractions

Attraction	<i>Percentages</i>				
	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
Base: All Visitors	401	467	1,935	417	3,220
Hammershus Castle	29	63	67	35	59
Hammershus exhibition	3	23	21	9	18
Østerlars round church	15	44	44	23	39
Other churches	12	41	41	20	35

Table 4-32: Visits to natural attractions

Attraction	<i>Percentages</i>				
	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
Base: All Visitors	401	467	1,935	417	3,220
Christiansø	3	23	22	5	18
Gardens	5	19	-	-	-
Randkløve Skaar	4	8	-	-	-
Paradisbakkerne	7	38	33	14	28
Ekkodalen	8	35	33	15	28
Rytterknægten	7	30	33	15	25
Helligdomsklipperne	14	46	44	18	38
Jons Kapel	9	35	34	12	28

Note: 1. "-" indicates that this answer choice was removed from the questionnaire.

Table 4-33: Visits to museums

Percentages

Museum	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year 2001
Base: All Visitors	401	467	1,935	417	3,220
Bornholms Art Museum	5	24	16	9	15
Bornholms Museum	3	11	-	-	-
Gudhjem Museum	n/a ¹	8	-	-	-
Oluf Høst Museum	n/a ¹	15	14	8	13
Nexø Museum	n/a ¹	2	-	-	-
Martin Andersen Nexø Museum	n/a ¹	5	-	-	-
Defence Museum	n/a ¹	3	-	-	-
Quarry Museum	n/a ¹	9	-	-	-
Farm Museum	n/a ¹	10	9	2	8
Automobile Museum	n/a ¹	5	-	-	-
Erichsens Gaard	n/a ¹	5	-	-	-
Other museums	-	-	18	6	-

Notes: 1. n/a means not available, because the museum was closed during the time in question.
2. "-" indicates that this answer choice was removed from the questionnaire.

Table 4-34: Visits to craft and other attractions

Percentages

Attraction	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year 2001
Base: All Visitors	401	467	1,935	417	3,220
Glass factory/shop	15	60	67	34	57
Ceramic factory/shop	6	39	43	15	35
Art galleries	1	36	44	13	35
Joboland Brændesgårdshaven	n/a ¹	13	26	n/a ¹	23
Fish smoke house	5	75	77	27	64
Natur Bornholm	12	39	31	13	28
Medieval Centre	n/a ¹	13	17	7	15
A lighthouse	14	35	42	22	36

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

4.6. Activities undertaken by visitors

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

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

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

Findings

4.6.1. Water based activities

As also was the case in the previous years the most popular water based activity in 2001 is going to the beach (Table 4-35). During 2001 almost two thirds of the visitors went to the beach. Especially in the third quarter going to the beach and swimming in the sea are important water based activities. Some 80% of the visitors in the third quarter went to the beach and 69% went swimming in the sea.

Obviously there are differences between the quarters. The share that went to the beach in 2001 varies from 26% in the fourth quarter to 80% in the third. The share that went swimming in the sea varies from 4% in the first and fourth quarter to 69% in the third quarter. This reflects the island's importance as a beach holiday destination. The share that went swimming in the sea is 69% in the third quarter of 2001

compared with 52% in the third quarter of 2000. This has to be seen as a result of the relatively warm summer in year 2001 compared with 2000.

4.6.2. Specific activities

To complement water activities such as wind surfing or fishing, visitors were asked whether they had played golf, gone to the trotting races or taken a scenic air flight (Table 4-36). Throughout the period from July 1995 – June 2001 participation in these specific activities has been small, which is the main reason why the answer categories *scenic air flight* and *trotting races* were removed from the questionnaire in the summer of 2001.

4.6.3. Entertainment activities

Given that there is a considerable amount of self-catering amongst holidaymakers and there are many people on holiday who are visiting friends and relatives, eating out is an important form of entertainment (Table 4-37). Overall more than two thirds of the visitors to Bornholm in 2001 ate out during their stay. The share varies between 39% in the fourth quarter and 79% in the third quarter.

Many leisure tourists are compulsive shoppers, so it is not surprising that shopping is an important activity. In the third quarter of 2001 almost 90% of the visitors went shopping. This is at the same level as in 2000.

4.6.4. General recreational activities

Commensurate with the image of Bornholm as a holiday island where life proceeds at a leisurely pace, Table 4-38 indicates that just relaxing and driving around are common general recreational activities. In 2001 some 81% drove around the island and 89% were just relaxing. Walks on my/our own are also significant, particularly for visitors in the second and third quarter.

4.6.5. Other activities

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

Table 4-35: Participation in water based activities

Activity	<i>Percentages</i>				
	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year 2001
Base: All Visitors	401	467	1,935	417	3,220
Going to the beach	28	63	80	26	64
Swimming in the sea	4	25	69	4	49
Swimming in the pool	3	15	28	5	20
Wind surfing	0	2	-	-	-
Boat trips	5	18	26	6	20
Fishing	6	10	8	4	7

Note: 1. - means that the answer possibility was not present.

Table 4-36: Participation in specific activities

Activity	<i>Percentages</i>				
	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year 2001
Base: All Visitors	401	467	1,935	417	3,220
Scenic air flight	0	3	-	-	-
Golf	0	7	8	2	6
Trotting races	0	5	-	-	-

Note: 1. "-" indicates that this answer choice was removed from the questionnaire.

Table 4-37: Participation in entertainment activities

Percentages

Activity	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year 2001
Base: All Visitors	401	467	1,935	417	3,220
Music recitals	2	4	-	-	-
Going to the cinema	3	5	-	-	-
Eating out	40	67	79	39	69
Shopping	55	77	89	65	81

Note: 1. "-" indicates that this answer choice was removed from the questionnaire.

Table 4-38: Participation in general recreational activities

Percentages

Activity	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year 2001
Base: All Visitors	401	467	1,935	417	3,220
Cycling	4	26	-	-	-
Guided coach tour	2	12	11	1	9
Guided walks	4	11	12	4	10
Walks on my/our own	30	53	55	42	50
Just relaxing	71	87	95	74	89
Driving around	65	81	86	71	81

Note: 1. "-" indicates that this answer choice was removed from the questionnaire.

4.7. Transport

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

Findings

4.7.1. Transport mode

By far the most popular mode of transport used for travelling about the island is the car (Table 4-39). This has been true throughout the period July 1995 – December 2001.

Overall, some 94% of the visitors in 2001 used their own car, a hired car or a private car provided by firm or friends as transport mode. The share varies from 90% in the third quarter to 98% in the first and fourth quarter. The share of people using a car to move around the island has increased in 2001 and can be seen as a result of the fixed link (Øresundsbron) between Denmark and Sweden. However, there has also been a notable increase in travellers using the bus link (Bornholmerbussen) and the newly established train connection from Copenhagen Central station to Ystad harbour.

Table 4-39: Transport mode

Percentages

Transport	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year 2001
Base: All Visitors ¹	363	413	1,707	349	2,832
Public Bus	13	13	14	15	14
Coach Tour	2	1	5	1	4
Taxi	6	4	3	5	4
Car	98	93	90	98	94
Motorbike	0	1	1	1	1
Bicycle	15	25	33	15	27
On foot	37	40	55	47	50
Other	0	1	1	1	1

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

4.8. Visitor expenditure

One of the most difficult aspects of the survey were questions to visitors about their expenditure patterns on Bornholm. Overall amounts of expenditure were asked for, including return transport costs from the

mainland to the island, together with a more detailed breakdown of expenditure on the island. An important distinction is made between those travelling on an inclusive (package) trip and those travelling independently, albeit that they may have used an agency to make the necessary bookings. Only gross values are shown here but a more detailed analysis is possible.

Findings

4.8.1. Expenditure per person per trip

The expenditure per person per trip reflects the difference between lengths of stay on the island. Visitors in the third quarter stay the longest on average (Table 4-8) and therefore tend to spend the most (Table 4-40). In the fourth quarter visitors to Bornholm spend DKK 1,296 on average compared with 2,703 in the third quarter. This also reflects the type of accommodation in the different quarters. Many visitors in the fourth quarter stay with family and friends while holiday cottages are much used as type of accommodation in the third quarter (Table 4-20).

4.8.2. Expenditure per person per day

When comparisons are made on the basis of expenditure per person per day, those on an inclusive tour tend to record the highest daily spending (Table 4-41). Visitors on an inclusive tour spend on average DKK 405 per person per day while visitors on an independent tour spend on average DKK 326 per person per day. Overall the visitors to Bornholm spend DKK 332 per person per day.

Table 4-40: Expenditure per person per trip

DKK

Country	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
Base: All Visitors	316	286	1,237	269	2,108
Independent	1,448	1,663	2,704	1,289	2,289
Inclusive	2,040	2,051	2,688	1,543	2,515
All	1,459	2,018	2,703	1,296	2,309

Table 4-41: Expenditure per person per day

DKK

Country	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
Base: All Visitors	316	286	1,237	269	2,108
Independent	304	320	335	276	326
Inclusive	603	365	407	323	405
All	308	323	341	277	332

4.9. Bornholm as a visitor destination

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

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

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

Findings

4.9.1. Place to visit for holiday and recreation

As a holiday destination, Bornholm is very highly rated by all visitors, without exception throughout the period July 1995 to December 2001. Throughout year 2001 some 97% of all visitors regard the island as good/excellent as a destination for holiday. The visitors in the second and third quarter are most satisfied (Table 4-42) while the visitors in the first quarter are less satisfied (although still very satisfied).

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

4.9.2. Likes about Bornholm

The most popular remarks on what visitors like about Bornholm in 2001 were:

- Varied nature;
- Stability and stillness;
- Local hospitality and friendliness;
- Small fishing villages;
- Good walking and bicycle paths;
- Beaches;
- The landscape and nature.

4.9.3. Dislikes about Bornholm

When asking visitors during 2001 what they disliked about Bornholm, they tended to repeat the suggestions already made for improvements, save that the ranking, in terms of significance, was changed. Top of their agenda for dislikes are:

- Lack of value for money;
- Too expensive;
- Too few departures to Bornholm;
- Too few activities outside the peak season;
- Bad sign posting.

These latter comments serve to amplify the complex nature of the tourist purchase, which involves the visitor coming into contact with a great variety of people and places, so that a poor experience at one service encounter can colour the visitor's whole attitude to the destination and thereby the overall evaluation of the experience.

4.9.4. Probability of returning

Table 4-44 examines the probability that visitors will return to Bornholm. Throughout the years visitors outside the peak season show the highest likelihood of returning. This is also the case in 2001 and has to be seen in connection with the main purpose of visit in those quarters. Outside the main season many visitors come to the island to visit friends and relatives or to combine holiday with visiting friends and relatives.

Overall, 48% of the visitors in 2001 reply that they certainly will return to Bornholm while 1% answer certainly not. This is at the same level as in 2000.

4.9.5. Possible time of return

With respect to the timings of a return trip to Bornholm, visitors were asked in a staged process, from *this year* up to the *next five years*, when they were likely to come back to the island. The results are shown in Table 4-45. There are possibilities of multiple answers here, in that the same respondent could be coming

back several times within the time frame given. The answers reported are those saying *certain* or *likely* only.

Table 4-42: Bornholm as a holiday destination

Percentages

Evaluation	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
Base: All Visitors	326	396	1,827	358	2,907
Excellent	67	73	76	75	75
Good	24	24	21	20	22
Average	7	3	3	4	3
Not good enough	1	*	*	*	*
Poor	1	0	*	1	*
Average score ¹	3.56	3.70	3.73	3.69	3.70

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

Table 4-43: Value for money

Percentages

Evaluation	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
Base: All Visitors	280	349	1,665	300	2,594
Excellent	36	34	34	39	34
Good	33	39	33	36	34
Average	28	25	27	19	26
Not good enough	3	2	5	5	5
Poor	1	*	1	1	1
Average score ¹	2.99	3.03	2.93	3.05	2.96

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

Table 4-44: Probability of returning

Percentages

Probability	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
Base: All Visitors	345	404	1,798	367	2,914
Certain	64	47	41	65	48
Likely	21	29	29	21	27
Maybe	12	20	23	12	20
Unlikely	3	4	6	3	5
Certainly not	1	1	1	*	1

Note: 1. * means less than 0.5%

Table 4-45: Timing of return

Percentages

Timing ¹	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
Base: All Visitors	296	194	849	225	1,403
This year	89	70	44	68	60
Next year	76	67	59	88	67
Next 2 years	77	74	60	85	65
Next 5 years	76	76	64	76	67

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

5. Bornholm residents

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

5.1. Characteristics of Bornholm residents

Findings

5.1.1. Border destination

Throughout 2001 some 79% of the residents stated their destination as somewhere in Denmark and 10% mentioned somewhere in Sweden (Table 5-1). While looking at the quarters it appears that Denmark as a destination was most noticeable in the fourth quarter. In this quarter some 84% of the residents had some place in Denmark as their final destination.

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

5.1.2. Purpose of trip

Table 5-2 shows purpose of trip among residents leaving Bornholm by ferry in 2001. The main purpose for the residents was related to family visits, either solely visiting friends and relatives or various combinations. However, residents going on a business trip account for almost one quarter of the total number of residents leaving Bornholm in 2001.

5.1.3. Party size

Party size presentation by quarter is shown in Table 5-3. In the first quarter of 2001 almost half of the residents were travelling alone which was also the case in the same period in 2000 and 1999. Throughout the year 2001 some 42% were travelling alone and 36% were travelling two persons together.

Overall, average party size among residents in 2001 was 2.1 persons. The party size was lowest in the fourth quarter (2.0) and highest in the third quarter (2.3).

Table 5-1: Residents by border destination

Destination	<i>Percentages</i>				
	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year
Base: Residents	455	218	303	332	1,308
Denmark	81	79	76	84	79
Sweden	7	11	12	8	10
Germany	3	2	5	4	3
Norway	2	2	1	2	2
Others	7	6	6	2	6

Table 5-2: Residents by purpose

Percentages

Purpose	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year 2001
Base: Residents	398	216	279	331	1,224
Business conference/meeting/exhibition	9	5	11	4	7
General business	21	14	11	13	16
Holiday	14	15	28	9	16
Holiday/VFR	6	3	*	1	3
VFR solely	16	16	15	22	17
Sporting event	3	1	2	1	1
Education	4	1	1	1	2
Removal	3	6	3	1	3
Family/friends get -together	12	17	10	36	19
Other ¹ (including above combinations)	12	22	19	12	16

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

Table 5-3: Residents by party size

Percentages

Party Size	1st Qtr 2001	2nd Qtr 2001	3rd Qtr 2001	4th Qtr 2001	All Year 2001
Base: Residents	481	223	310	336	1,350
1	48	41	33	43	42
2	35	36	40	33	36
3	6	9	10	12	9
4	7	10	9	8	8
5	3	3	5	3	3
6	1	*	1	0	*
More than 6	0	1	2	1	2
Average (persons)	2.1	2.1	2.3	2.0	2.1

Note: 1. * means less than 0.5%.

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Appendix 1. Accommodation in Bornholm

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

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

Source: Denmark's Statistics and own survey.



SEA DE PARTURES

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

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

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

Q3 On what date did you arrive in Bornholm?

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

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

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

Q6 What is the *main* purpose of your visit?

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

Q7 Is this your first visit to Bornholm?

- (1) Yes
- (99) No

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

- (1) Yes
- (99) No

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

Q10 Did you ever come to Bornholm as a child?

- (1) Yes, with my family/relatives/friends
- (2) Yes, visiting family/relatives/friends
- (3) Yes, with my school
- (4) Yes, with my sporting club
- Yes, in another way _____
(please specify)

(99) No

Q11 When was the last time you visited Bornholm?

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

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

You may choose as many possibilities as you wish.

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

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

Very Im- Less Un-
important portant important important

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

Q14 Booking arrangements - please look at the following statements and indicate as appropriate:
Yes No

Transport

- I booked transport directly with the carrier
- I booked transport through a travel agent
- I booked transport through the Internet
- My company took care of my bookings
- Family/friends in Bornholm took care of the booking of transportation

Accommodation

- I booked accommodation directly with the landlord/proprietor
- I booked accommodation through a travel agent
- I booked accommodation through the Internet
- I am staying with friends/relatives, so I did not have to book
- Family/friends in Bornholm took care of the booking of accommodation

Other

- I bought a package/inclusive tour, e.g. one price for transport and accommodation, from a travel agent
- I used a travel agent near my home
- I used a travel agent in Bornholm/Bornholm tourist office to make my bookings
- I booked through a summer house booking agency in Bornholm
- I booked through a summer house agency elsewhere
- I travel with a club or an association
- Apart from the above regarding bookings, I did the following:

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

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

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

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

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

	<i>Ex- cellent</i>	<i>Good</i>	<i>Ave- rage</i>	<i>Not good enough</i>	<i>Poor</i>
Service					
Accommodation					
Food and beverages					
Cleaning standard					
Price level					
Facilities					
Location/situation					
Decor					
Overall value for money					

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

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

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

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

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

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

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

Other _____
(please specify)

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

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

Total amount DKK _____

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

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

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

Q23 May we have your estimate of the breakdown of this expenditure (excl. any expenditure on day visit)?

Please state all amounts in Danish kroner (DKK).

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

Q24 Does this relate solely to your trip to Bornholm?

- (1) Yes
(99) No

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

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

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

Excel- Good Aver- Not Poor
lent age good
enough

For holidays and recreation
Value for money

Q27 How likely would you be to return to Bornholm for a holiday in the near future?

Certain Likely Maybe Unlikely Certainly not

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

Certain Likely Maybe Unlikely Certainly not

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

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

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

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

No, not more often, because

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

Yes, a major influence
Yes, to some extent

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

Now we would like to ask you something about yourself

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

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

Q32 Are you retired?

- (1) Yes
(99) No

Q33 Which age group do you belong to?

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

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

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

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

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

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

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

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

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

Q38 Would you like us to communicate your *likes* and *dislikes* to the Tourist Bureau? They may want to get in touch with you. If so would you please PRINT your NAME, ADDRESS, POST CODE and TELEPHONE NUMBER here?

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

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



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

questionnaire will be treated strictly private and confidential.

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

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

Q3 On what date did you arrive in Bornholm?

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

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

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

Other _____
(please specify)

Q6 What is the *main* purpose of your visit?

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

Other _____
(please specify)

SEA DEPARTURES

Q7 Is this your first visit to Bornholm?

- (1) Yes
- (99) No

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

- (1) Yes
- (99) No

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

Q10 Did you ever come to Bornholm as a child?

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

(99) No (please specify)

Q11 When was the last time you visited Bornholm?

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

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

You may choose as many possibilities as you wish.

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

Other _____
(please specify)

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

Very Im- Less Un-
 important portant important important

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

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

Yes No

Transport

- I booked transport directly with the carrier
- I booked transport through a travel agent
- I booked transport through the Internet
- My company took care of my bookings
- Family/friends in Bornholm took care of the booking of transportation

Accommodation

- I booked accommodation directly with the landlord/proprietor
- I booked accommodation through a travel agent
- I booked accommodation through the Internet
- I am staying with friends/relatives, so I did not have to book
- Family/friends in Bornholm took care of the booking of accommodation

Other

- I bought a package/inclusive tour, e.g. one price for transport and accommodation, from a travel agent
- I used a travel agent near my home
- I used a travel agent in Bornholm/Bornholm tourist office to make my bookings
- I booked through a summer house booking agency in Bornholm
- I booked through a summer house agency elsewhere
- I travel with a club or an association
- Apart from the above regarding bookings, I did the following:

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

Visited

Yes No

- Bornholms Velkomstcenter
- Gudhjem Turistbureau
- Hasle Turistbureau
- Nexø-Dueodde Turistbureau
- Nordbornholms Turistbureau
- Svaneke Turistbureau
- Sydbornholms Turistbureau

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

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

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

	Ex- cellent	Good	Ave- rage	Not good enough	Poor
Service					
Accommodation					
Food and beverages					
Cleaning standard					
Price level					
Facilities					
Location/situation					
Decor					
Overall value for money					

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

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

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

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

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

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

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- (9) On foot
- Other _____
(please specify)

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

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Total amount DKK _____

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

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(1) Yes

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(1) Yes Total amount DKK _____

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

Excellent Good Average Not good enough Poor

For holidays and recreation
Value for money

Q27 How likely would you be to return to Bornholm for a holiday in the near future?

Certain Likely Maybe Unlikely Certainly not

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

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

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

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

No, because _____ not _____ more _____ often,

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Yes, to some extent

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

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