

Cycling tourism in north-western Poland, on Bornholm and in southern Sweden

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1 Introduction

The South Baltic regions: Central Pomerania, Bornholm and Southern Sweden are geographical very close. All those three regions have a lot in common regarding cultural heritage. On the other hand, great mental and cultural differences, especially between the people from Poland and those from Denmark and Sweden still occur. This multi-cultural environment is one of the greatest advantages and makes the South Baltic Region very attractive.

Due to new cultural and naturalistic approach in the European Union countries, there are still more opportunities to exploit the undiscovered potential of The South Baltic Region, particularly in the tourism sector. The environmental unfriendly, traditional massive tourism, which still occurs in most coastal regions, is slowly losing its leading position. There is a growing interest for sustainable forms of activity, respecting protections needs for natural and cultural heritage. One of these forms is bicycle tourism, which is very high on agenda today. The unique landscape and rich cultural heritage of Regions of Central Pomerania, Bornholm and Scania, provide the best conditions for bicycling. All those regions have successfully developed a lot of their own bicycle routes, but there is a lack of one big cross-border route. The main idea of this project is to support the sustainable development and promotion of the South Baltic Region, by creating a joint cross-border bicycle thematic route “Vikings and Slavs – in search for a common heritage”.

<http://www.project-united.eu/>

The purpose of this report is to form part of the basis of formulation of a strategy for the work ahead for the above project, which is called “United in diversity”.

Project partners

The Association of Communes and Districts of the Middle Pomerania Region came into being with the day 26.04.2002. Continuing the activity and tasks of the Union of Communes of Central Pomerania in Koszalin created in 1994 by authorities from Będzino, Manowo, Mielno, Sianów Communes and city Koszalin. A main objective of the Association it to support the idea of the territorial autonomy, the defence of join business and co-operating for the harmonious social-economic development of members.

Find more: www.ko-pomerania.pl

Foteviken Museum— project Partner from Sweden. The Museum has three main spheres of activities: The maritime archaeology and history is the important base of the museum activities, the task of making the Viking Age and Early Middle Ages resurrect and spreading out of knowledge of history via modern IT-techniques. The Museum of Foteviken owns some 70.000 square metres of meadowland at The Bay of Hoellviken

Find more: www.foteviken.se

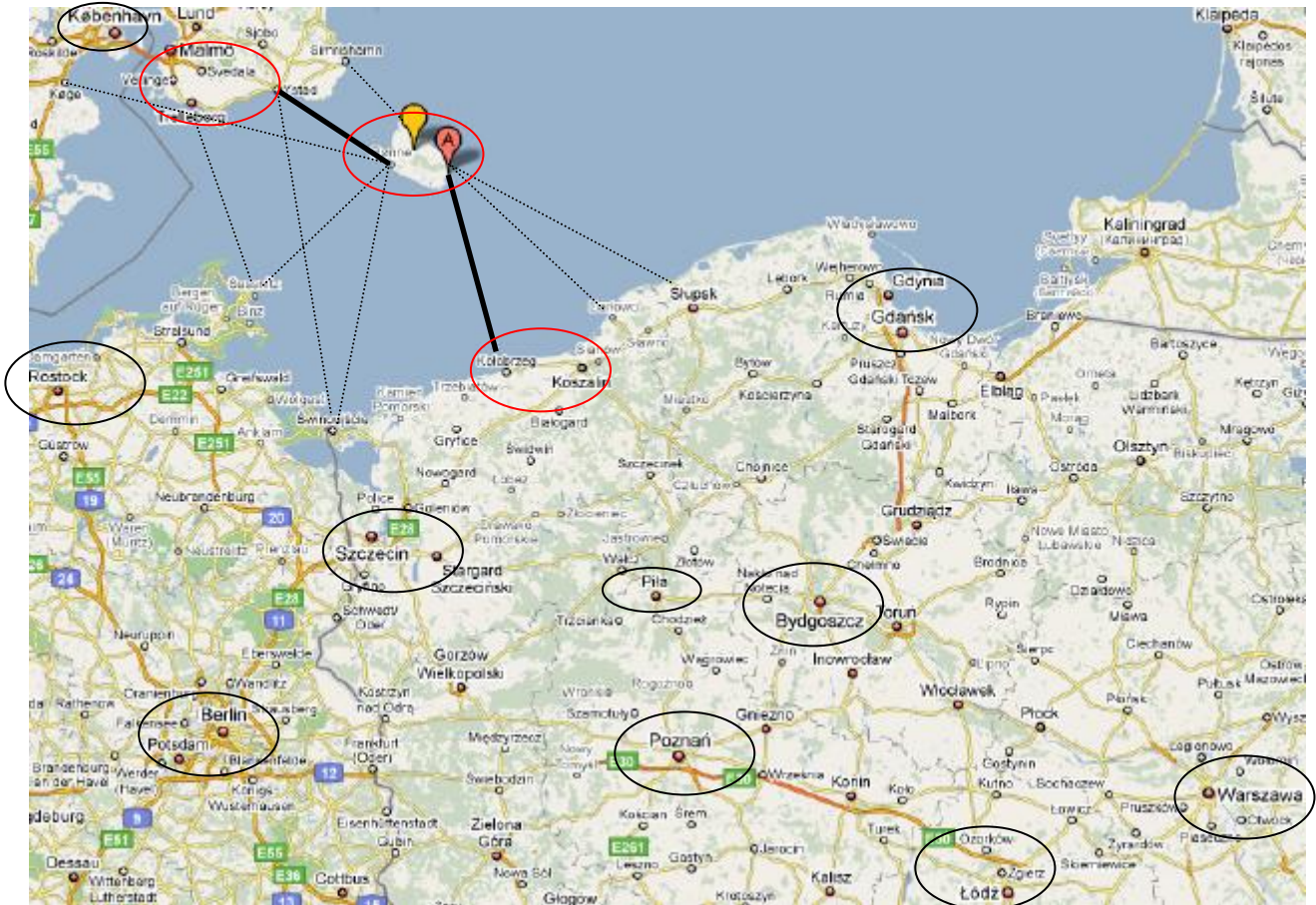
Vellinge Municipality located in the south-western corner of Sweden. Neighbour to the Öresund bridge and lovely cities for excursions such as Malmö, Copenhagen, Trelleborg and the whole of Söderslätt. Vellinge Municipality has its roots far back in history and is known today as a good place to live and to visit.

Find more: www.vellinge.se

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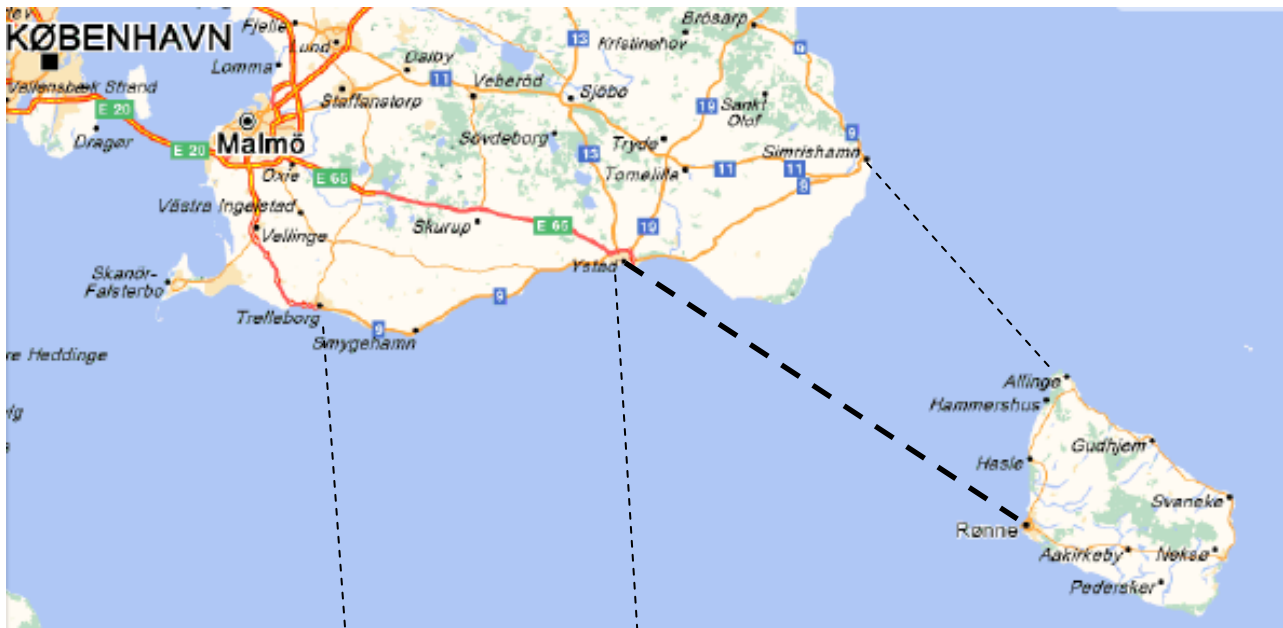
Find more: www.crt.dk

Figure 1 Ferry routes and the location of the three partners looking to establish a tri-nation bicycle-route



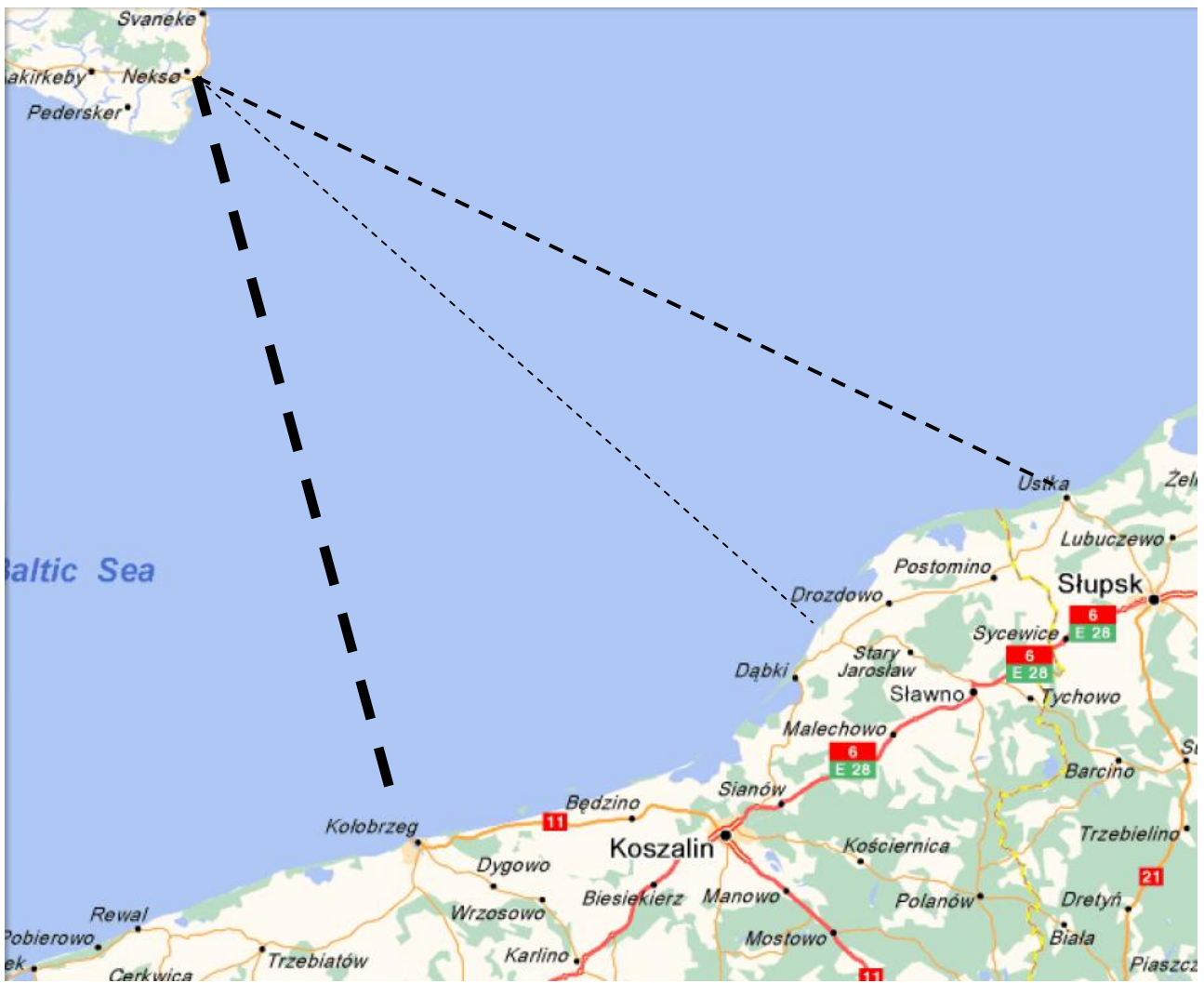
Source: Google maps.

Figure 2 Map sections – Scania and Bornholm – Bornholm and Northern Poland



Source: ViaMichelin.com. - Note: Ferry lines and ports added.

Figure 3 Map sections – Bornholm and Northern Poland – with ferry routes



Source: ViaMichelin.com

2 Definition and conceptualisation of cycling tourism

According to Lumsdon (1996), cycle tourists include:

- Day excursionists
- Short-break cyclists (one to three nights)
- Holiday cyclists (four or more nights)

There are several variants of definitions of cycle tourists. Ritchie (1998) proposes the following:

A cycle tourist is a person who is away from their home town or country for a period not less than 24 hours or one night, for the purpose of a vacation or holiday, and for whom using a bicycle as a mode of transport during this time away is an integral part of their holiday or vacation. This vacation may be independently organized or part of a commercial tour and may include the use of transport support services and any type of formal and/or informal accommodation.

Nomadic holiday cyclists in this paper will be defined as those holiday cyclists staying at least at two different accommodations after they have arrived at their cycling destination – i.e. they are away from home for at least two nights. The degree of nomadity may extend to cycling in one, two or more countries (or states) during the same holiday, and thus several cycling destinations. Nomadic holiday cyclists - and other holiday cyclists - may cycle every day or occasionally take a day off from cycling while at the cycling destination. Also, on cycling holidays of more than two nights at the cycling destination(s) nomadic cyclists may stay one or two additional nights at one particularly favoured or convenient accommodation.

Sustrans (1999), distinguished between three main types of cycle tourism: a. Cycling holidays, b. holiday cycling, c. cycling day visits. Thus, for some (holiday cyclists) cycling is just one of a number of activities undertaken during the holiday. Long cycling holidays comprise four or more nights (op.cit.). Cycle touring holidays comprise more than one place of accommodation, and are thus undertaken by nomadic holiday cyclists as defined above. Sustrans (1999) define cycle tourism broader than Ritchie (1998) as follows:

Recreational visits, either overnight or day visits away from home, which involve leisure cycling as a fundamental and significant part of the visit (Sustrans, 1999).

But what about residents, making a day excursion in their home area, are they also holiday cyclists? No, they are cycle excursionists. However, they form an important part of the user basis and justification for establishing and maintaining the cycle trails which are fundamental for holiday cycling and holiday cyclist. Some cycle trails may even be used for daily commuting, cf. below pyramid.

Holiday cyclists could be defined as those cycling at least 50% of the days during a holiday. They may be nomadic or stationary. Nomadic holiday cyclists would typically be cycling every day, and certainly at least 50% of the days. Hard core holiday cyclists would be cycling every day. Some numbers illuminating the cycling behaviour and other behaviour and preferences of different categories of cycling tourists as well as how cycling tourists differ from other holiday-makers will be presented in this paper.

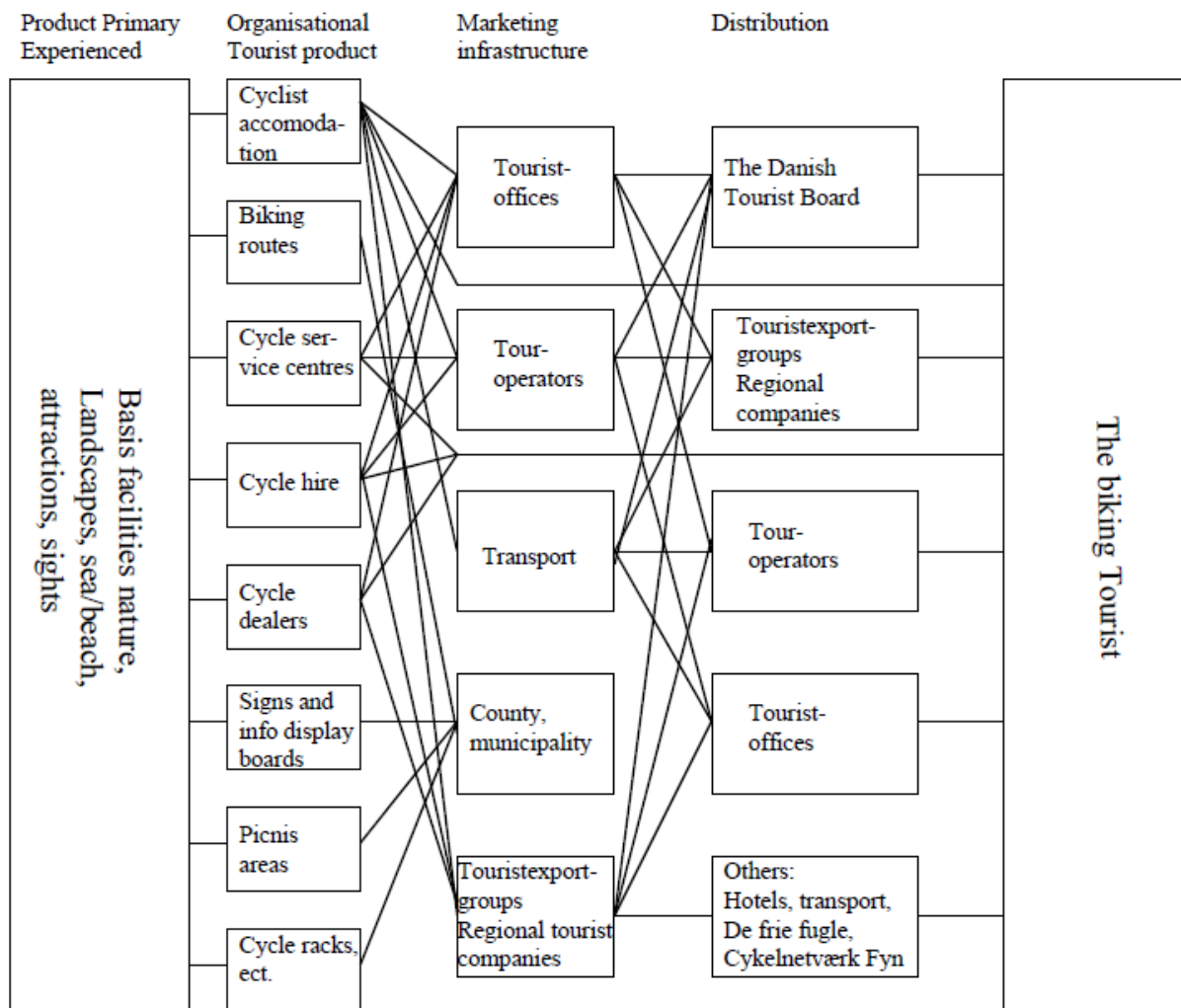
Figure 4 Pyramid of goals in a bicycle destination



Source: Claudia Krieger (Germany) - Touristische Projekte: Cycling Tourists - Who they are, what they want, and how they improve regional Economy, www.nationaler-radverkehrsplan.de/

It could be stated that it is not really the goal of a bicycle destination to be one of several cycle holiday destinations, but to be the main cycle holiday destination. A cycle trail may pass several cycle holiday destinations, and the cycle trail itself could be regarded as a cycle holiday destination, from the users' point of view.

Figure 5 The cycling tourism product



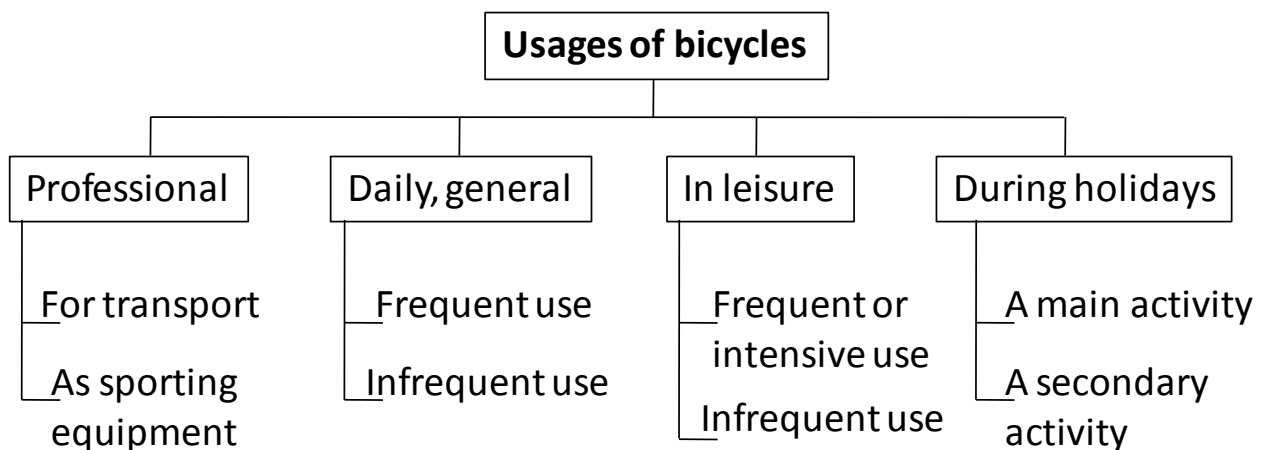
Source: Peter Saabye Simonsen, Birgitte Jørgensen, Derek Robbins (1998). Cycling tourism, www.crt.dk/media/Cycling_tourism.pdf

According to a survey (ADAC, 2007), about 90% of bicycle holidays are self-organised, while 10% are package tours (8% for domestic cycle holidays, but as much as 20% for foreign). – However, there are special operators, who offer packages for example to Bornholm – for example

BikingBornholm.dk (website in Danish, English, and German) or mecklenburger-radtour.de (website in German and English). The latter offers tours from Northern Germany into Northern Poland (e.g. Usedom to bay of Gdansk, 10 days, 499 km or Stralsund-Kolberg/Kolobrzeg, 8 days, 256 km) and on Bornholm (9 or 7 days, 8 or 6 nights, 184 km), among others destinations. So does DieLandpartie.de (website exclusively in German). Their 6 semi-weekly up-market 7 days Bornholm cycle tour packages are with 3 nights in Rønne and 3 nights in Svaneke, at hotels, and total cycling route of 226 km. The offer of DieLandpartie.de in Poland include a 10 day tour of 375 km from Stettin (Szczecin) to Danzig (Gdansk), and their Swedish tour of 12 days is 479 km across the country from Göteborg.

The below diagram shows different uses of bicycles: Professional, general daily, cycling in spare time and finally cycling on holidays. On holidays the use of the bicycle may be one among a number of other activities, or it may be a main activity.

Figure 6 Forms of usage of bicycles



Source: Own translation from: Sachsen-Anhalt, Ministerium für Wirtschaft und Arbeit (2008). Radtourismus in Sachsen-Anhalt - Analysen, Handlungsempfehlungen, Perspektiven. adreyer.hs-harz.de/downloads/radtourismus.pdf.

Some additional models and concepts:

Figure 7 Ansoff's growth matrix

	Existing products	New products
Existing markets	Market penetration	Product development
New markets	Market development	Diversification

Source: Based on Igor Ansoff (1957). Strategies for Diversification, Harvard Business Review, Oct. 113-124, as reprinted in numerous textbooks, including every edition of Philip Kotler.

If Scania wants to attract Polish cycling holiday-makers, that would be market development. If a GPS cycle routing service were added for an existing cycle destination such as Bornholm, then that would be product development. If existing cycle trails were improved or new ones built, for example in Koszalin County, that would also be product development.

Figure 8 Steps in market segmentations, targeting and positioning

1. Identify bases for segmenting the market
2. Develop profiles of resulting segments
3. Develop measures of segment attractiveness
4. Select the target segment(s)
5. Develop product/service positioning for each target segment
6. Develop marketing mix for each target segment

Source: Philip Kotler. Marketing Management (5th edition or later).

There may be many ways of segmenting cycle tourists:

- Geographic: Where they come from, where they cycle. Size of city/region. Distance from home to where cycling starts.
- Socio-demographic: Age, gender, family composition, income level, type of cycle. Ownership of car.
- Psychographic: Life-style, personality. – Interests and preferences for themes of cycle holidays.
- Behaviour: Type of accommodation, length of cycling stages, number of nights at destination, number of nights each place, intensity/frequency of cycling., mode of transport to get to point where cycling starts, self-catering vs. visits to restaurants

Table 1 Clasifying cyclists, holiday cyclists and (monadic) cycling holiday-makers

	None or no more than one place of accommodation	Two or more places of accommodation
One day, no nights	1. Excursionists <ul style="list-style-type: none"> - From within region - Others from own country - Foreign day visitors 	0. Not possible
One or more nights	2. Holiday cyclists, one place of accommodation <ul style="list-style-type: none"> - Cycling in home country - Cycling in one foreign countries 	3. Monadic cycling holiday-makers <ul style="list-style-type: none"> - Cycling in home country - Cycling in one or more foreign country

Source: Own development.

Reducing the above table, eliminating the redundant cell:

Clasifying cyclists, holiday cyclists and (monadic) cycling holiday-makers

Category of cycling visitors	Description
1. One day, no nights	Excursionists <ul style="list-style-type: none"> - From within region - Others from own country - Foreign day visitors
2. One or more nights, one place of accommodation	Holiday cyclists, one place of accommodation <ul style="list-style-type: none"> - Cycling in home country - Cycling in one foreign country
3. Two or more nights, two or more places of accommodation	Monadic cycling holiday-makers <ul style="list-style-type: none"> - Cycling in home country - Cycling in one or more foreign countries

Source: Own development.

Table 2 Number of cycling destinations and types of cycling visitors

	No overnight stays	Holiday cyclists: One or more overnight stays at one place	Monadic cycling holiday-makers: Overnight stays at least two different places, during the cycling trip
Level 1: Home country only <ul style="list-style-type: none"> - Cycling in the local area, own region - Cycling in other parts of the home country 	Local cycling excursionists Other domestic cycling day visitors.	E.g. Danes cycling during holiday on Bornholm	E.g. Poles cycling in West Pomerania.
Level 2: One foreign country <ul style="list-style-type: none"> - Cycling in one foreign country - Cycling in own country plus one foreign country 	Foreign cycling day visitors.	E.g. Germans cycling during holiday on Bornholm	E.g. Poles cycling on Bornholm, Denmark.
Level 3: Two foreign countries <ul style="list-style-type: none"> - Cycling in two foreign countries - Cycling in two foreign countries plus home country 			E.g. Poles cycling on Bornholm (DK) and in Scania, Sweden.
Level 4: Three foreign countries: <ul style="list-style-type: none"> - Cycling in three foreign countries - Cycling in three foreign countries plus home country 			E.g. Germans making a cycle holiday through three other countries.

Source: Own development.

Level 1 consists of excursionists, cycling in their own region for a pleasure ride. Level 1 also comprise domestic holiday cyclists.

Level 2 consists of those cycling in at least one foreign country. Those in this category might cycle in their own country as well.

Level 3 consists of those cycling in two foreign countries during the same cycling holiday. In addition to two foreign countries they may cycle in their home country as well.

Level 4 could comprise Germans cycling in Poland, on Bornholm and in Scania.

Table 3 Levels of cycling holiday adventures – information sources and technology usage

	No web, no GPS	Website	Website+GPS routes
Level 1: Home country only - Cycling in the local area, own region - Cycling in other parts of the home country			
Level 2: One foreign country - Cycling in one foreign country - Cycling in own country plus one foreign country			
Level 3: Two foreign countries - Cycling in two foreign countries - Cycling in two foreign countries plus home country			
Level 4: Three foreign countries: - Cycling in three foreign countries - Cycling in three foreign countries plus home country			

Source: Own development.

3 Bornholm: Tourism and cycle tourism on Bornholm

3.1 General travel and tourism statistics about Bornholm

Table 4 Bednights on Bornholm 2000-2008 by source markets and types of accommodation.

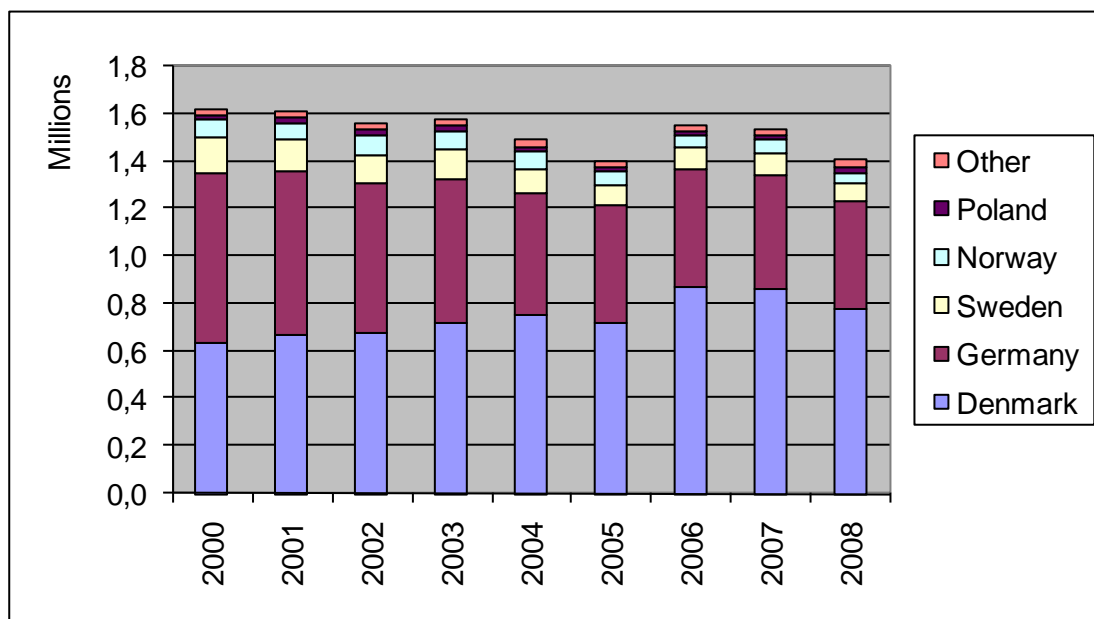
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2007-08%	2008%
Denmark	637.408	667.636	678.848	715.612	755.412	716.925	874.166	860.268	775.397	-9,9%	55%
Germany	715.786	692.353	625.413	609.820	510.557	499.370	496.067	482.195	455.089	-5,6%	32%
Sweden	148.571	132.340	120.079	123.107	103.113	87.258	90.623	90.626	74.854	-17,4%	5%
Norway	76.040	70.184	87.094	81.432	70.018	53.912	48.618	55.743	46.952	-15,8%	3%
Poland	20.247	23.162	24.250	21.544	16.284	19.193	16.943	18.081	21.016	16,2%	1%
Other	22.710	22.644	28.406	24.021	40.997	21.537	23.893	30.925	38.539	24,6%	3%
Bornholm	1.620.762	1.608.319	1.564.090	1.575.536	1.496.381	1.398.195	1.550.310	1.537.838	1.411.847	-8,2%	100%
Change	1,9%	-0,8%	-2,8%	0,7%	-5,0%	-6,6%	10,9%	-0,8%	-8,2%		

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2007-08%	2008%
Hotels	338.609	321.523	326.424	320.255	301.947	279.970	299.740	295.460	269.564	-8,8%	19%
Holiday centres	234.034	255.215	234.262	250.291	238.519	185.552	197.334	189.586	171.071	-9,8%	12%
Cottages	639.000	640.000	612.000	608.000	597.000	565.000	640.000	674.461	622.068	-7,8%	44%
Camping	297.948	281.047	290.060	293.443	265.613	261.901	305.994	283.296	266.400	-6,0%	19%
Youth hostels	54.103	53.192	51.415	51.130	47.327	52.611	50.115	47.674	41.680	-12,6%	3%
Yachts	57.068	57.342	49.929	52.417	45.975	53.161	57.127	47.361	41.064	-13,3%	3%
Bornholm	1.620.762	1.608.319	1.564.090	1.575.536	1.496.381	1.398.195	1.550.310	1.537.838	1.411.847	-8,2%	100%
Change	1,9%	-0,8%	-2,8%	0,7%	-5,0%	-6,6%	10,9%	-0,8%	-8,2%		

Source: Based on data from Statistics Denmark.

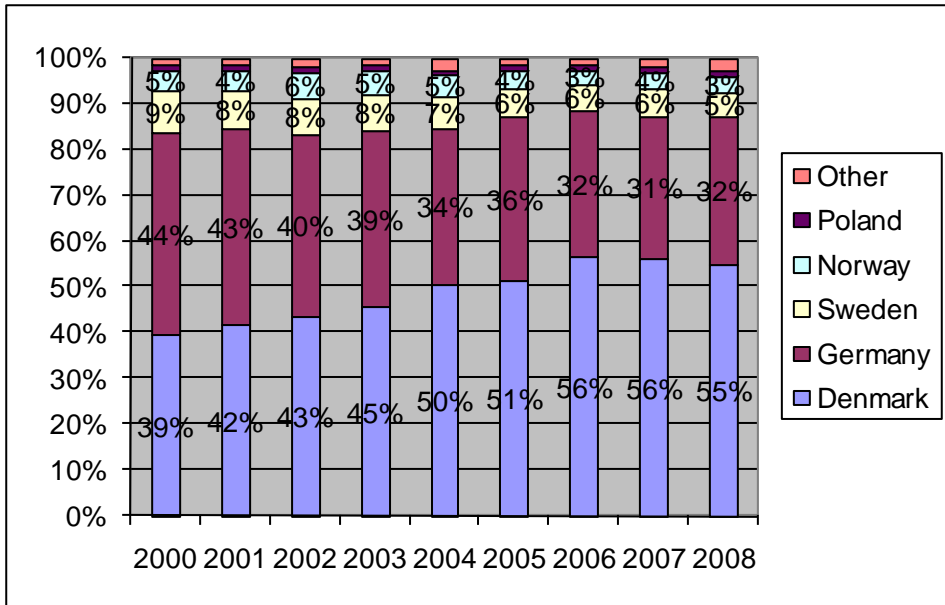
Note: Excludes Polish visitors in holiday cottages and at primitive camping sites.

Figure 9 Bednights on Bornholm 2000-2008 by source markets



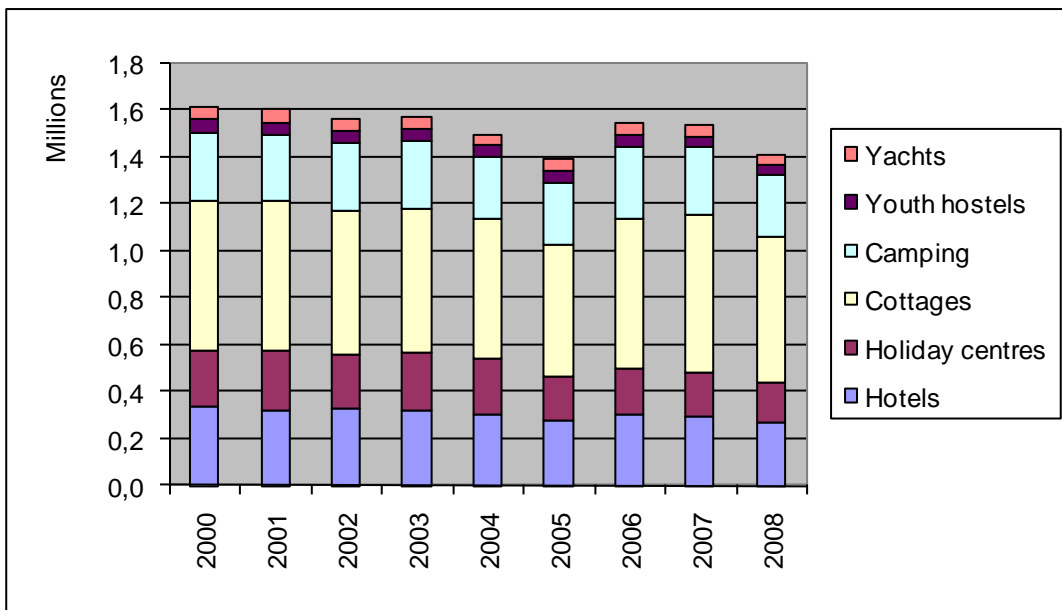
Source: Based on data from Statistics Denmark.

Figure 10 Bednights on Bornholm 2000-2008 by source markets (percent)



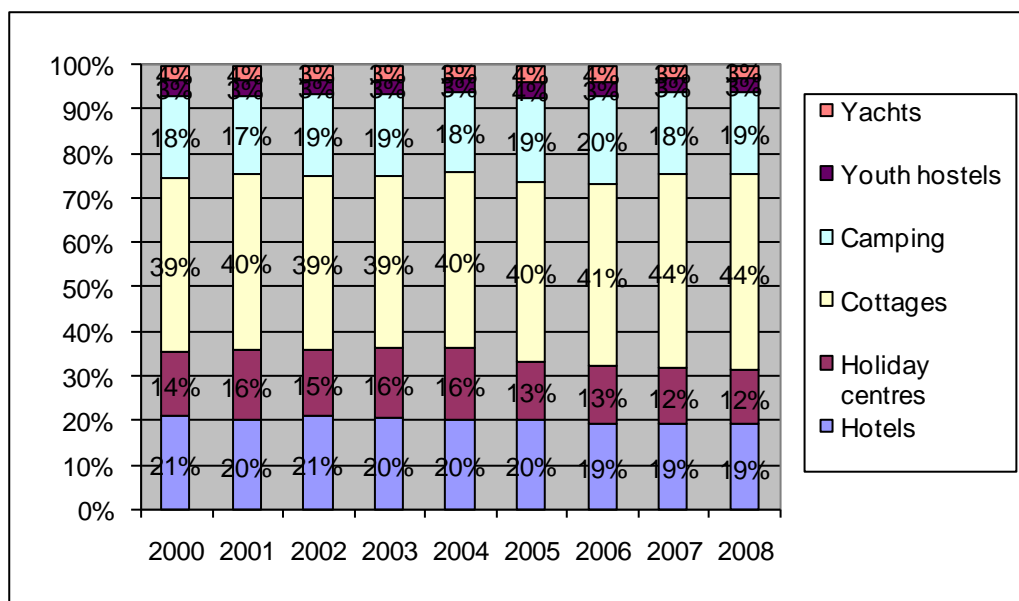
Source: Based on data from Statistics Denmark.

Figure 11 Bednights on Bornholm 2000-2008 by types of accommodation



Source: Based on data from Statistics Denmark.

Figure 12 Bednights on Bornholm 2000-2008 by types of accommodation (percent)



Source: Based on data from Statistics Denmark.

Table 5 Bednights on Bornholm 2000-2008 by source markets and types of accommodation: Percent

Bornholm	2000	2001	2002	2003	2004	2005	2006	2007	2008
Denmark	39%	42%	43%	45%	50%	51%	56%	56%	55%
Germany	44%	43%	40%	39%	34%	36%	32%	31%	32%
Sweden	9%	8%	8%	8%	7%	6%	6%	6%	5%
Norway	5%	4%	6%	5%	5%	4%	3%	4%	3%
Poland	1%	1%	2%	1%	1%	1%	1%	1%	1%
Other	1%	1%	2%	2%	3%	2%	2%	2%	3%
Bornholm	100%	100%	100%	100%	100%	100%	100%	100%	100%
Mio. nights	1,62	1,61	1,56	1,58	1,50	1,40	1,55	1,54	1,41
Bornholm	2000	2001	2002	2003	2004	2005	2006	2007	2008
Hotels	21%	20%	21%	20%	20%	20%	19%	19%	19%
Holiday centres	14%	16%	15%	16%	16%	13%	13%	12%	12%
Cottages	39%	40%	39%	39%	40%	40%	41%	44%	44%
Camping	18%	17%	19%	19%	18%	19%	20%	18%	19%
Youth hostels	3%	3%	3%	3%	3%	4%	3%	3%	3%
Yachts	4%	4%	3%	3%	3%	4%	4%	3%	3%
Bornholm	100%	100%	100%	100%	100%	100%	100%	100%	100%
Mio. nights	1,62	1,61	1,56	1,58	1,50	1,40	1,55	1,54	1,41

Source: Based on data from Statistics Denmark.

Table 6 Bornholm's share of all bednights in Denmark, by source markets and types of accommodation

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2007-08%
Denmark	3,6%	3,7%	3,6%	3,6%	3,8%	3,5%	4,0%	3,7%	3,3%	-0,4%
Germany	4,6%	4,6%	4,1%	4,0%	3,7%	3,8%	3,7%	3,5%	3,6%	0,0%
Sweden	5,8%	5,7%	5,3%	5,5%	4,8%	4,3%	4,5%	4,6%	4,1%	-0,5%
Norway	3,6%	3,4%	3,8%	3,4%	3,0%	2,4%	2,1%	2,3%	2,0%	-0,2%
Poland	29,5%	33,7%	29,3%	32,6%	23,7%	26,2%	16,3%	12,9%	14,7%	1,8%
Other	0,6%	0,6%	0,8%	0,7%	1,0%	0,5%	0,5%	0,7%	0,9%	0,2%
Bornholm	3,9%	3,9%	3,7%	3,6%	3,5%	3,3%	3,5%	3,4%	3,2%	-0,2%
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2007-08%
Hotels	3,7%	3,5%	3,5%	3,5%	3,1%	2,8%	2,8%	2,7%	2,5%	-0,2%
Holiday centres	5,7%	6,4%	5,7%	6,2%	6,1%	4,9%	5,4%	4,7%	4,5%	-0,2%
Cottages	4,3%	4,4%	4,0%	3,9%	4,0%	3,9%	4,2%	4,1%	4,0%	-0,1%
Camping	2,8%	2,6%	2,6%	2,4%	2,3%	2,3%	2,6%	2,4%	2,2%	-0,2%
Youth hostels	4,9%	5,0%	4,8%	5,0%	4,8%	4,9%	4,1%	3,7%	3,3%	-0,3%
Yachts	3,8%	3,8%	3,3%	3,3%	3,2%	3,6%	3,4%	4,4%	3,6%	-0,7%
Bornholm	3,9%	3,9%	3,7%	3,6%	3,5%	3,3%	3,5%	3,4%	3,2%	-0,2%

Source: Calculated by CRT, based on data from Statistics Denmark.

Polish visitors to Bornholm spent a total of about 5317 person-weeks on Bornholm in 2008. Polish bednights on Bornholm exceeded 30.000 for the first time ever, and reached 37.200 person-nights, including estimates for Polish person-nights in holiday cottages and at primitive camping sites (tent sites).

Table 7 Bednights on Bornholm 2000-2008 by visitors from Poland by types of accommodation.

Poland	2000	2001	2002	2003	2004	2005	2006	2007	2008	Weeks '08	2008%
Hotels	1.025	1.059	1.341	885	518	1.038	1.125	1.492	1.541	220	4%
Holiday centres	9.855	12.419	10.400	10.543	9.458	7.144	4.303	6.032	5.662	809	16%
Cottages, est.	1.000	1.600	2.000	2.000	2000	2.825	3.729	6.500	10.000	1.429	29%
Camping	7.274	7.549	10.612	8.326	4.595	8.865	8.875	8.067	10.400	1.486	30%
Tent sites, est.	2.400	2.600	2.800	3.000	3.200	3.400	3.600	3.800	4.000	571	11%
Youth hostels	512	671	478	248	201	316	279	335	314	45	1%
Yachts	1.261	1.115	935	1.242	1176	1.410	2.361	2.155	3.099	443	9%
Total, Poland	23.327	27.013	28.566	26.244	21.148	24.998	24.272	28.381	35.016	5.002	100%
Poland's share	1,4%	1,7%	1,8%	1,7%	1,4%	1,8%	1,6%	1,8%	2,5%		

Note: Includes estimates for Polish visitors in holiday cottages and at primitive camping sites.

Poland's (estimated) share of bednights on Bornholm reached an all time high in 2008, i.e. 2.5%. Poland's share was 1.8% in 2007, and so it was back in 2002.

Table 8 The share of Polish visitors of bednights on Bornholm 2000-2008 by types of accommodation.

Poland's share	2000	2001	2002	2003	2004	2005	2006	2007	2008	2007-08%
Hotels	0,3%	0,3%	0,4%	0,3%	0,2%	0,4%	0,4%	0,5%	0,6%	0,1%
Holiday centres	4,2%	4,9%	4,4%	4,2%	4,0%	3,9%	2,2%	3,2%	3,3%	0,1%
Cottages, est.	0,2%	0,3%	0,3%	0,3%	0,3%	0,5%	0,6%	1,0%	1,6%	0,6%
Camping	2,4%	2,7%	3,7%	2,8%	1,7%	3,4%	2,9%	2,8%	3,9%	1,1%
Tent sites, est.	67%	67%	67%	67%	67%	67%	67%	67%	67%	0,0%
Youth hostels	0,9%	1,3%	0,9%	0,5%	0,4%	0,6%	0,6%	0,7%	0,8%	0,1%
Yachts	2,2%	1,9%	1,9%	2,4%	2,6%	2,7%	4,1%	4,6%	7,5%	3,0%
Bornholm	1,4%	1,7%	1,8%	1,7%	1,4%	1,8%	1,6%	1,8%	2,5%	0,6%

Note: Includes estimates for Polish visitors in holiday cottages and at primitive camping sites.

Table 9 Bednights on Bornholm 2000-2008 by visitors from Sweden by types of accommodation.

Sweden	2000	2001	2002	2003	2004	2005	2006	2007	2008
Hotels	54.488	44.191	40.422	47.648	40.823	33.386	38.086	37.788	33.637
Holiday centres	22.558	24.085	20.600	19.669	16.668	6.540	8.502	6.915	4.117
Cottages	16.000	18.000	17.000	17.000	16.000	15.000	16.000	22.213	15.779
Camping	36.378	27.704	24.977	22.392	15.945	15.713	12.976	11.553	12.300
Youth hostels	7.665	6.950	7.651	6.062	5.792	5.309	3.934	3.494	2.888
Yachts	11.482	11.410	9.429	10.336	8.309	11.310	11.125	8.663	6.133
Bornholm	148.571	132.340	120.079	123.107	103.537	87.258	90.623	90.626	74.854

Source: Statistics Denmark.

Table 10 Camping season on Bornholm by nationality and months in 2007 and 2006

	3	4	5	6	7	8	9	10	2007	2007%
Denmark	0%	0%	5%	8%	60%	22%	4%	1%	189499	67%
Germany	0%	0%	3%	9%	37%	46%	4%	0%	62621	22%
Sweden	0%	1%	4%	12%	54%	25%	3%	1%	11553	4%
Poland	0%	1%	5%	14%	32%	47%	1%	0%	8067	3%
Norway	0%	0%	1%	11%	71%	15%	1%	0%	5417	2%
Netherlands	0%	0%	1%	16%	43%	33%	6%	0%	4345	2%
Other	1%	0%	6%	11%	33%	44%	4%	0%	1794	1%
I alt	0%	0%	4%	9%	54%	29%	4%	1%	283296	100%

	3	4	5	6	7	8	9	10	2006	2006%
Denmark	0%	1%	3%	9%	60%	23%	4%	1%	209791	69%
Germany	0%	0%	3%	9%	36%	47%	4%	0%	63227	21%
Sweden	0%	1%	4%	10%	57%	26%	1%	0%	12976	4%
Poland	0%	1%	1%	7%	32%	56%	2%	0%	8875	3%
Norway	0%	0%	0%	6%	76%	16%	1%	0%	5521	2%
Netherlands	0%	0%	1%	3%	32%	63%	1%	0%	3952	1%
Other	0%	0%	4%	13%	43%	40%	0%	0%	1652	1%
I alt	0%	1%	3%	9%	54%	30%	4%	1%	305994	100%

Source: Based on data from Statistics Denmark.

Table 11 Passengers and arrivals by transport connections to/from Bornholm, 2000-2008

Passengers %	2000	2001	2002	2003	2004	2005	2006	2007	2008
Ystad	53%	64%	66%	70%	70%	75%	72,4%	72,0%	73,2%
Simrishamn		0%					1,3%	1,1%	1,4%
Sealand	21%	13%	14%	13%	10%	7%	5,5%	5,6%	5,5%
Germany	12%	10%	9%	8%	7%	5%	5,3%	5,6%	5,8%
Poland	0,7%	2,2%	3,3%	2,0%	2,1%	2,5%	3,2%	3,1%	3,4%
Airplane	14%	10%	8%	8%	11%	10%	12,3%	12,6%	10,7%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%
Passengers	2000	2001	2002	2003	2004	2005	2006	2007	2008
Ystad	803	1.037	1.115	1.156	1.222	1.242	1.301	1.307	1.310
Simrishamn		3					24	20	25
Sealand	312	216	231	216	184	119	98	102	99
Germany	177	163	144	129	121	91	95	101	103
Poland	11	36	56	33	37	42	58	57	60
Airplane	216	167	139	127	191	161	221	228	192
Total (*1000)	1.519	1.622	1.684	1.661	1.755	1.655	1.797	1.815	1.789
Arrivals	2000	2001	2002	2003	2004	2005	2006	2007	2008
Ystad	402	519	558	578	611	621	651	654	655
Simrishamn		2					12	10	13
Sealand	156	108	116	108	92	60	49	51	50
Germany	89	82	72	65	61	46	48	51	52
Poland	6	18	28	16	18	21	29	29	30
Airplane	108	84	69	64	96	81	111	114	96
Total (*1000)	759	811	842	830	877	828	899	908	895
Cruise visitors	10	11	7	6	11	8	7	10	10
Yacht sailors	14	13	13	13	12	13	13	9	10
Total w/cruise/yacht	783	836	862	849	900	849	918	927	915
Visitors / residents	2000	2001	2002	2003	2004	2005	2006	2007	2008
Visitors	526	557	595	581	614	579	626	632	626
Residents	233	254	247	250	264	249	273	275	269
Arrivals, total (*1000)	759	811	842	830	877	828	899	908	895
Visitors	69%	69%	71%	70%	70%	70%	70%	70%	70%
Residents	31%	31%	29%	30%	30%	30%	30%	30%	30%
Bednights, regist. * 1000	1.621	1.608	1.564	1.576	1.496	1.399	1.556	1.538	1.412
Person-weeks*1000, based on reg. bednights.	232	230	223	225	214	200	222	220	202
Regist. bednights in % of paid bednights	88%	88%	88%	88%	88%	88%	88%	88%	88%
All paid full person-weeks	263	261	254	256	243	227	253	250	229
	2000	2001	2002	2003	2004	2005	2006	2007	2008
Index, visitors	100	106	113	110	117	110	119	120	119
Index, registered overnights	100	99	97	97	92	86	96	95	87
Index, lenght of stay	100	94	85	88	79	78	81	79	73
	2000	2001	2002	2003	2004	2005	2006	2007	2008
Average length of stay, nights	7,3	6,8	6,2	6,4	5,8	5,7	5,9	5,7	5,3
No. of stays in paid accommodations	253	268	287	280	296	279	302	305	301
Other stays by visitors ***	273	289	308	301	318	300	324	328	324
Nights per stay in rented cottages (DK.stat.)	10,5	10,4	10,2	10,1	9,3	9,4	9,2	8,7	8,7

Source: Based on data from Statistics Denmark. Compiled and presented by CRT.

3.2 Insights from a national survey (2004): How are cycling tourists on Bornholm different than other holidaymakers on Bornholm and how are they different from cyclists elsewhere in the Denmark?

This section is based on a national survey commissioned by VisitDenmark in 2004. It is based on almost 8000 holiday tourists, of which 366 visited Bornholm. - Cycle tourists cover a wide spectrum, from those who cycle just a little bit (2 on a scale from 1 to 5), to those who cycle a lot (5 on a scale from 1 to 5). Among those visitors on Bornholm, who stay in commercial accommodations, 15% of cycle a lot (5 on a scale from 1 to 5). Even disregarding those who answer 2 on the scale from 1 to 5, leave 38% who answer 5 or 4 or 3 on the 1-5 scale. The cycle intensity is lower among those who stay in their own summer house or with friends and relatives. Therefore, when including the latter, around a quarter of all visitors to Bornholm cycle.

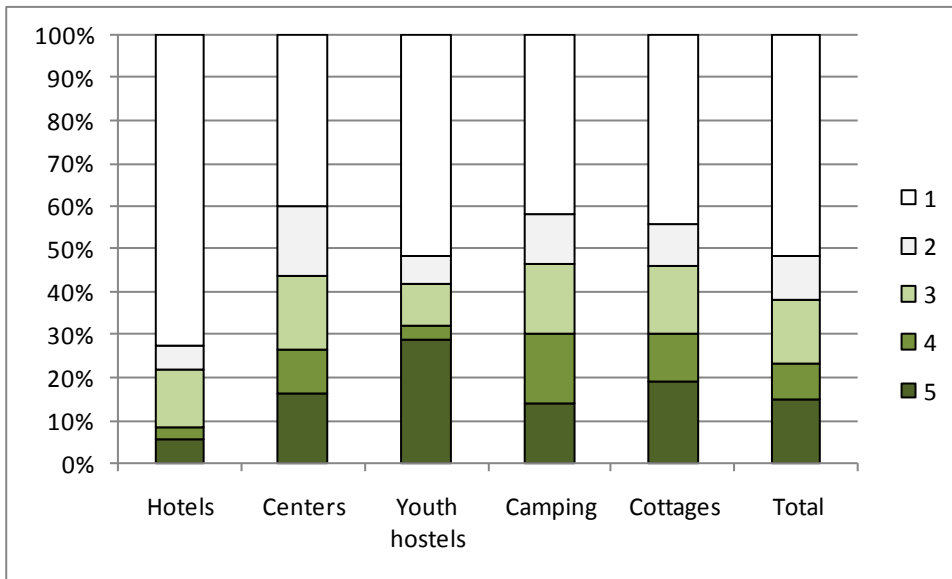
Table 12 Different intensities of cycling among tourists on Bornholm in commercial accommodations

Type of accommodation	39.Go for pleasure ride on bicycle					Total	Total, n	Split, n
	5	4	3	2	1			
Hotels	6%	3%	13%	6%	72%	100%	105	29%
Centers	16%	10%	17%	16%	40%	100%	87	24%
Youth hostels	29%	3%	10%	6%	52%	100%	31	8%
Camping	14%	16%	16%	12%	42%	100%	43	12%
Cottages	19%	11%	16%	10%	44%	100%	100	27%
Total	15%	8%	15%	10%	52%	100%	366	100%
Total %	15%	8%	15%	10%	52%	100%		

Type of accommodation	39.Go for pleasure ride on bicycle				Rest	Total, n	Split, n
	5	4+5	3+4+5				
Hotels	6%	9%	22%	78%	105	29%	
Centers	16%	26%	44%	56%	87	24%	
Youth hostels	29%	32%	42%	58%	31	8%	
Camping	14%	30%	47%	53%	43	12%	
Cottages	19%	30%	46%	54%	100	27%	
Total	15%	23%	38%	62%	366	100%	
Total %	15%	23%	38%	62%			

Source: Based on a survey commissioned by VisitDenmark in 2004.

Figure 13 Different intensities of cycling among tourists on Bornholm in commercial accommodations



Source: Based on a survey commissioned by VisitDenmark in 2004.

In the below table it is shown how those tourists on Bornholm, who cycle a lot (5 on a scale from 1 to 5), are different from other holiday-makers on Bornholm. There are about 16 things which frequently cycling tourists do more than others, and 11 things which cyclists on Bornholm do less than other tourists on Bornholm.

Table 13 Comparing those who cycled a lot and those who did not cycle a lot, in Bornholm and elsewhere in Denmark

		CYCLISTS vs. others, Bornholm	CYCLISTS vs. others, Copenhagen	CYCLISTS vs. others, rest of DK	CYCLISTS vs. others, all of DK	ALL Bornholm vs. ALL Funen	CYCLISTS Bornholm vs. CYCLISTS FUNEN
		1	2	3	4	5	6
29	39.Go for pleasure ride on bicycle	22,310	35,453	90,477	100,621	2,436	0,000
66	F6_Cycling	15,292	23,614	63,229	70,008	3,136	0,540
18	37.Possibility of bicycling	8,994	13,740	36,758	41,247	4,003	0,757
122	Distant	4,422	1,108	3,507	1,732	-5,151	-1,587
139	Nights	4,042	1,416	8,115	9,326	-3,240	-1,208
7	37.Few tourists	3,997	0,516	3,472	5,040	-3,135	-0,496
21	37.Possibility of enjoying Danish food	3,910	-0,027	-0,962	-0,019	-0,564	2,484
13	37.Theatre/music/festival	2,839	0,425	0,340	0,563	-1,179	1,341
124	No_return	2,784	-0,001	-0,537	-0,876	-1,219	-0,081
42	Q39_Walks_always	2,631	1,284	11,768	11,717	3,022	2,210
9	37.Child friendly	2,497	1,007	-0,355	1,644	-0,615	1,482
133	Y_Hostels	2,354	3,174	2,741	3,858	-0,952	0,094
125	First_time	2,242	0,335	0,384	-0,822	-1,893	0,289
107	F7_info_Friends	2,208	1,422	-2,398	-1,132	-0,390	1,547
56	Q39_Playing_always	2,186	4,237	-0,514	1,713	-1,164	0,657
50	Q39_Cooking_always	2,142	9,682	10,034	12,206	-8,743	-3,264
4	37.Special events	2,133	-1,120	-2,692	-2,508	-0,487	1,973
39	39.Meet new friends or acquaintances	2,123	2,728	2,683	3,528	-2,624	0,557
51	Q39_Shopping_always	1,983	-1,698	1,934	0,553	-1,968	0,473
11	37.Attractions/amusements	-1,974	-0,942	-6,334	-6,896	7,367	2,209
78	36b.Ads, brochures, radio or tv spots on D	-2,072	1,318	-1,262	-1,051	5,705	1,115
141	27.b. Age	-2,185	-0,148	3,518	2,730	1,032	-1,114
118	Repeat_leisure	-2,242	-0,335	-0,384	0,822	1,893	-0,289
116	42b.Location of place of accomodation	-2,374	-0,996	2,473	1,886	-0,108	-0,868
126	Per_night	-2,415	-3,912	-6,919	-9,095	6,441	2,028
92	38.Cat./broch. etc. from regional/local tou	-2,600	0,394	0,060	0,024	8,607	0,371
112	42b.Price of accomodation	-2,688	-0,794	-1,208	-1,590	-0,863	-1,780
110	41.Expect to return within 3 years	-2,784	0,001	0,537	0,876	1,219	0,081
131	Hotels	-3,126	-6,422	-6,029	-9,516	4,786	-0,216
123	Near market	-4,422	-1,108	-3,507	-1,732	5,151	1,587
	n1	54	44	493	591	366	54
	n2	312	1135	5905	7352	510	81
	Total	366	1179	6398	7943	876	135
	n1 in % of total	15%	4%	8%	7%	42%	40%

Source: Based on a survey commissioned by VisitDenmark in 2004.

The above table shows that tourist on Bornholm who cycle a lot are different from other tourists on Bornholm in the following ways. First things they do more etc:

- Cyclist on Bornholm came because they wanted to cycle, which is not surprising (variable nr. 18).
- Although the majority of cyclists on Bornholm come from Scandinavia and Germany, there are relatively many cyclists on Bornholm who come from “distant markets”, i.e. other markets than Scandinavia and Germany.
- Cyclists on Bornholm stay for more nights than other tourists on Bornholm.
- Cyclists on Bornholm appreciate more being on their own, with few other tourist around them.
- Cyclists particularly appreciate the possibility of enjoying the local food.
- Cyclists on Bornholm are more into music and festivals than other tourists on Bornholm.
- Those who cycle a lot – on this visit to Bornholm – a less likely to say that they will return within the next three years than other tourists on Bornholm. – This may be seen in conjunction with the fact that they tend to come from “distant” markets.
- Tourists on Bornholm who cycle a lot also walk a lot.
- Cycling tourists particularly appreciate the child friendliness of Bornholm.
- Cycling tourists on Bornholm have a higher tendency than other visitors to Bornholm to stay at youth hostels.
- There is a relatively high proportion of first time visitors among cycle tourists on Bornholm.
- Cyclists of Bornholm tend to get information about the destination from friends and relatives.
- Those who cycle a lot, also tend to spend much time playing, and cooking their own food.
- Cyclists on Bornholm have a greater tendency to come for special events than other tourists.
- Cyclists on Bornholm tend to spend more time meeting new friends or acquaintances than other visitors to Bornholm.
- Finally, those tourists on Bornholm who cycle a lot, also tend to shop a lot.

Correspondingly, there are also a number of things that tourist on Bornholm who cycle a lot tend to do less that other tourists on Bornholm:

- Tourists on Bornholm who cycle a lot do not tend to come from near markets, cf. above.
- They to not tend to stay at hotels.
- They are less likely to expect to return within the next three years.

- They are less satisfied with the price of the accommodation than others.
- They are less likely to use catalogues from the local/regional tourist offices than others.
- They spend less on accommodation per night than others.
- They are less satisfied with the location of the place of accommodation than others.
- There is a relatively low proportion of repeat visitors among tourists on Bornholm who cycle a lot.
- They are younger than other tourists on Bornholm.
- They have relatively rarely been inspired by advertisements, brochures or TV spots before deciding to go on a cycling holiday on Bornholm.
- Those tourists on Bornholm who cycle are less likely than other tourists on Bornholm to have visiting attractions or amusement parks as a motive (reason) for coming.

When comparing (heavy) cycle tourist on Bornholm with cycle tourists on Funen (including the small islands to the south of Funen) there are only few significant differences, due to the small sample size, when selecting only those who cycle a lot at these two destinations:

- The local food (with smoked fish etc) is a more important motive for cycle tourist on Bornholm for cycle tourist on Funen.
- Cycle tourists on Bornholm also walk a lot, unlike cycle tourists on Funen.
- Cycle tourists on Bornholm are more likely than cycle tourists on Funen to have visiting attractions and amusements as a motive for coming.
- Cycle tourists on Bornholm spend more on accommodation per person per night than tourist on Funen. This is probably due to the fact that cycle tourist on Funen stay at camping sites to a greater extent than cycle tourists on Bornholm.
- Cycle tourists on Bornholm are more likely than cyclists on Funen to come for special events.
- There is one activity, which cycle tourists on Bornholm do less than cycle tourists on Funen, namely cooking their own food.

There are only three things which are significantly more common for cycle tourist on Bornholm, in Copenhagen and in the rest of Denmark – as opposed to those who do not cycle a lot:

- At all three destinations, and thus also for Denmark under one, those who cycle a lot also tend to always cook their own food.
- At all three destinations, and for Denmark under one, youth hostels are significantly more used by those who cycle than by those who don't cycle a lot.

- Thirdly, at all three destinations, and in Denmark overall, those who cycle a lot tend to meet new friends and acquaintances to a greater extent than those who do not cycle a lot.

There are only two things which are significantly less common for cycle tourists on Bornholm, in Copenhagen and in the rest of Denmark – as opposed to those who do not cycle a lot:

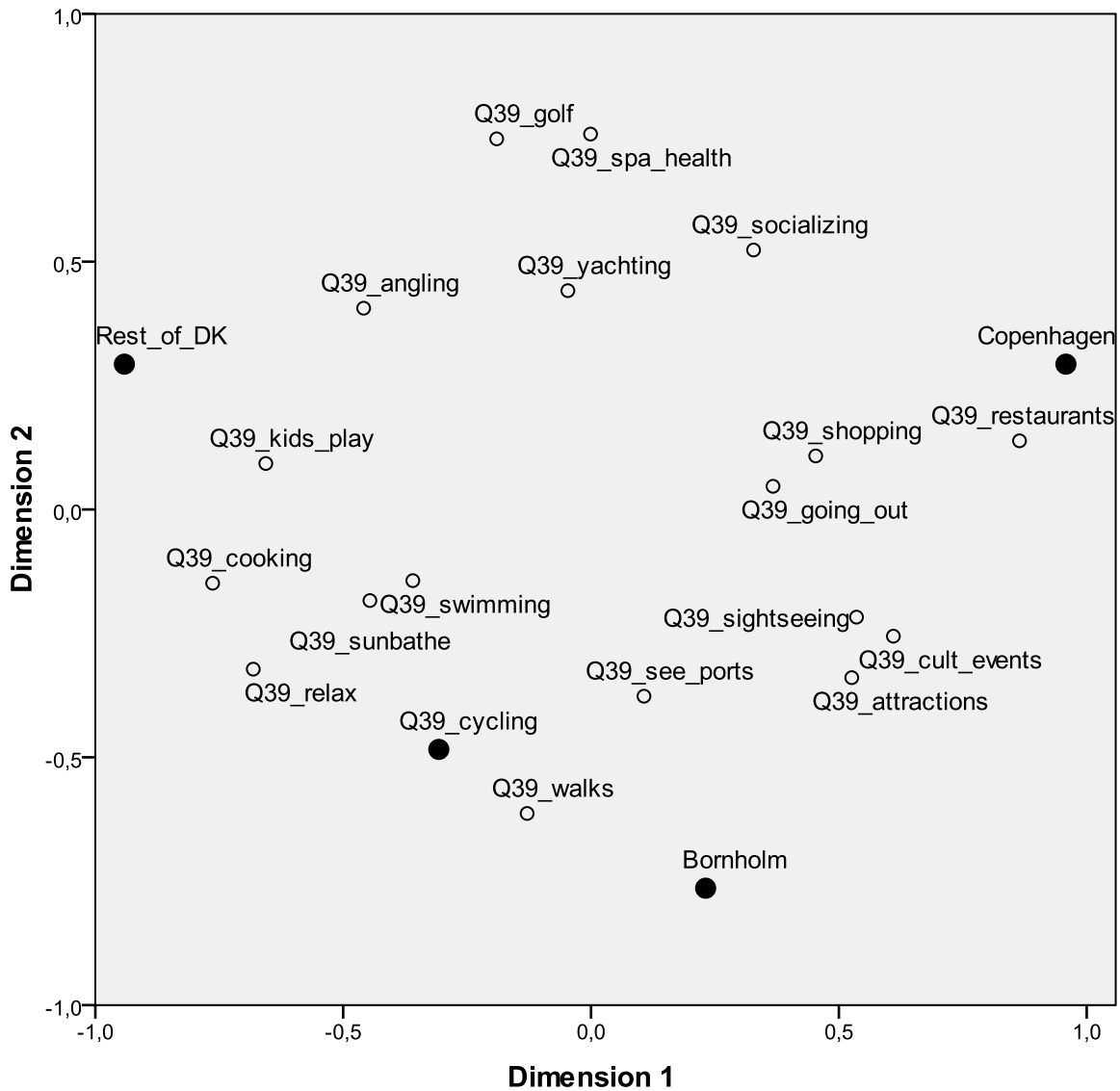
- Cycle tourists at all three destinations and in Denmark overall are less likely than other tourists to stay at hotels.
- And in line with the above: Cycle tourists at all three destinations and in Denmark overall spend significantly less on accommodation than others.

Disregarding Copenhagen and comparing cycle tourists at Bornholm with cycle tourists in the rest of the Danish province there are some additional things which cyclists do significantly more or less than others.

There are also a few characteristics where cyclists on Bornholm are different from cyclists elsewhere in Denmark (disregarding Copenhagen):

- On Bornholm cyclists are younger than other visitors to Bornholm, whereas in the rest of Denmark (disregarding Copenhagen) those who cycle a lot are older than those who don't.
- Cyclists on Bornholm tend to get information from friends etc. before deciding to go to Bornholm to a significantly greater extent than other tourists who visit Bornholm. The opposite is true for cycle tourists in other parts of Denmark (outside of Copenhagen): Cyclists in the rest of Denmark tend to get information from friends etc. before deciding to go to Bornholm to a significantly lesser extent than other leisure tourists who visit the rest of Denmark.

Figure 14 Interrelations between destinations and frequently undertaken activities



The above graph is based on a technique called Multidimensional Scaling. It shows how cycling and 18 other activities (those who answered 5 on a scale from 1 to 5) are related to each other and to different destinations in Denmark (Bornholm, Copenhagen, and rest of Denmark).

3.3 Insights from a survey among travellers on the routes Ystad-Rønne and Køge-Rønne (BornholmsTrafikken 2009)

Overall, about 19% of those tourists returning by the routes Rønne-Ystad and Rønne-Køge in 2009 cycled during their stay on Bornholm. In July the percentage of cyclists were as high as 32%.

Table 14 Cycling as an activity among tourist on Bornholm by month, 2009, Rønne-Ystad and Rønne-Køge

	Feb	May	Juli	Sep./okt~May	Nov~Feb	2009, est.
Cycled	2	15	47	15	2	81
Responses	48	89	149	89	48	423
Cycled, %	4%	17%	32%	17%	4%	19%

Source: Based on a survey undertaken by CRT for BornholmsTrafikken.

Among cyclists, there were a higher proportion of men than among non-cyclists. The age was slightly lower for cyclists than for non-cyclists. The cyclists are better educated than non-cyclists, but their income level is slightly lower than non-cyclists. None of these differences were significant, though, with the relatively small sample size for the series of activity question and other related questions. The average number of persons travelling together among those who cycled (in July) was 3.10 while the average was 3.77 for other tourists on the two mentioned routes. This difference is almost significant, with the given sample size (29+62=91 for this question).

There are several ways of cycling: You can “cycle all the way” – on your own bicycle. You can have a bicycle at the back or on the top of or even inside your car. And you can borrow a bicycle. And if you have a summerhouse etc. on Bornholm, you may have a bicycle of your own there.

Overall, 73% of (mostly Danish) cyclists came via the route Ystad-Rønne, while a relatively high proportion, 27% came via the route Køge-Rønne. Køge-Rønne is a night-ferry, which is probably convenient for cyclists. On the Rønne-Køge route, the majority of respondents happened to be cyclists (8 out of 12).

Table 15 Cyclists and non-cyclists on the routes from Rønne to Ystad or Rønne to Køge by BornholmsTrafikken, July 2009

Route	Cyclist		Total	Route	Cyclist		Total	Total, n
	No	Yes			No	Yes		
Rønne-Ystad	94%	73%	87%	Rønne-Ystad	73%	27%	100%	81
Rønne-Køge	6%	27%	13%	Rønne-Køge	33%	67%	100%	12
Total	100%	100%	100%	Total, %	68%	32%	100%	93
Responses, n	63	30	93	Total, n	63	30	93	

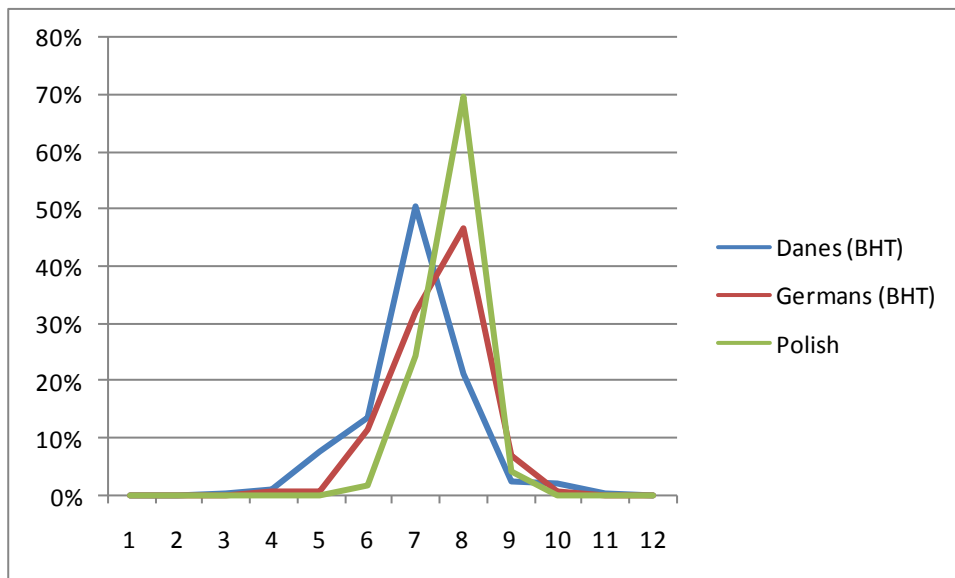
The vast majority of visiting cyclists on the two mentioned routes carry their bicycles on their cars, or rent or borrow them. In July 2008, i.e. the year before the above survey, 15% of the passengers on the route Rønne-Køge travelled with their bicycle, without car (based on reporting of number of passengers and number of bicycles transported to and by Statistics Denmark).

Table 16 Percentage of passengers travelling with a bicycle, without car, by ferry route to/from Bornholm by month, 2008

	1	2	3	4	5	6	7	8	9	10	11	12	2008	Bicycles~	Arriving
Rønne-Ystad	0,0%	0,0%	0,0%	0,1%	0,6%	0,5%	1,1%	0,6%	0,1%	0,0%	0,0%	0,0%	0,4%	5.461	2.731
Rønne-Køge	0,2%	0,2%	0,1%	1,1%	0,9%	7,8%	15%	10%	1,9%	2,6%	0,2%	0,4%	5,3%	5.221	2.611
Allinge-Simrishamn, est.						5%	15%	5%					9,2%	2.200	1.100
Rønne-Sassnitz			0%	1%	0%	3%	5%	6%	2%	1%	0%		3,7%	3.794	1.897
Nexø-Poland, est.				0%	0%	0%	5%	16%	7%	0%	0%		8,0%	3.990	1.995
Rønne-Swinoujscie						8%	11%	11%					10,9%	1.085	543
Bicycle share 2008	0,0%	0,0%	0,0%	0,2%	0,5%	1,2%	2,9%	3,1%	0,5%	0,2%	0,1%	0,0%	1,4%	21.751	10.876
Split by months	0,1%	0,1%	0,2%	0,7%	3,9%	10,4%	43,0%	36,7%	3,4%	1,2%	0,2%	0,1%	100%		

Sources: Based on reporting to Statistics Denmark, supplemented with own estimates and calculations.

Figure 15 The cycling season for Danes, Germans and Polish tourists on Bornholm, 2008, based on cycles transported by ferry lines per month according to Statistics Denmark



Source: Based on statistics from Statistics Denmark.

Note: Cycling on own bicycle only. Bicycles on cars and rented bicycles not included.

Below is a comparison of cyclists and non-cyclists returning from a holiday on Bornholm by the ferry routes Rønne-Ystad and Rønne-Køge, in the month of July 2009, the high season for Danish and other Scandinavian visitors to Bornholm.

Table 17 Length of stay for cyclists and other departing on the routes from Rønne to Ystad or Rønne to Køge by BornholmsTrafikken, July 2009

	Cyclists	Others	All
Number of days	7,03	6,81	6,88
Number of nights	6,33	6,37	6,35
No. of previous visits to Bornholm	2,55	3,07	2,90
n, no. of responses	30	63	93

Cyclists appear to be relatively eager to experience all aspects of Bornholm, except the golf courses. Thus, on a scale from 1 to 5, where 5 is maximum and 1 is minimum, those who cycled during their visit to Bornholm wanted to experience more than those visitors who did not cycle. The only exception from this was that cyclists generally did not come to play golf.

Table 18 Motives (reasons for coming to Bornholm) for cyclists and others departing on the routes from Rønne to Ystad or Rønne to Køge by BornholmsTrafikken, July 2009

	Cyclists	Others	All
Cycling possibilities	4,59	1,77	2,68
Nature	4,50	4,38	4,42
Environment and atmosphere	4,17	4,10	4,13
Recommendation from family/friends	3,76	3,18	3,37
Cultural history	3,52	3,09	3,23
Bornholm/local food	3,52	3,31	3,38
Art and culture offers	3,23	2,76	2,91
Family/friends lived on Bornholm	3,22	3,05	3,10
Walking possibilities	3,00	2,58	2,72
Fishing possibilities	1,86	1,62	1,70
Golf courses	1,21	1,68	1,53
n, no. of responses	~22	~43	~65

Note: Significant differences are marked by *. Scale used: 5=very important, 1=unimportant.

Motive	Score:	Score:	Mean difference	t-test: Equal. means		n1	n2	n1+2	Score: All	Overall rank
	Cyclists	Others		t	Sig. (2-tailed)					
Cycling	4,59	1,77	2,82	12,05	0,000	29	39	68	2,97	7
Nature	4,50	4,38	0,12	0,53	0,595	26	53	79	4,42	1
Atmosphere	4,17	4,10	0,07	0,25	0,803	23	49	72	4,13	2
Recommend. from family/friends	3,76	3,18	0,58	1,68	0,099	21	38	59	3,39	3
Cultural history	3,52	3,09	0,43	1,11	0,272	21	44	65	3,23	5
Bornholm (local) food	3,52	3,31	0,21	0,64	0,524	23	42	65	3,38	4
Art and cultural offers	3,23	2,76	0,47	1,36	0,180	22	41	63	2,92	8
Family/friends lived on Bornholm	3,22	3,05	0,17	0,35	0,724	18	42	60	3,10	6
Walking	3,00	2,58	0,42	1,21	0,232	24	43	67	2,73	9
Fishing	1,86	1,62	0,24	0,80	0,428	21	37	58	1,71	10
Golf	1,21	1,68	-0,47	-1,53	0,132	19	41	60	1,53	11
Overall	3,33	2,87	0,46			22	43	65		

Note: Scale used: 5=very important, 1=unimportant.

Overall, cycling as a motive ranked as number 7 out of 11 aspects, reason for visiting Bornholm. However, cycling as a motive ranked ahead of other physical activities such as walking, fishing and playing golf. – For those who actually cycled, cycling was the most important motive for coming to Bornholm, even more important than “nature”, which otherwise normally scores highest in surveys. For non-cyclists and overall (for cyclists and others under one), “nature” also came out as the most important motive in this survey.

Table 19 Information sources used by cyclists and other departing on the routes from Rønne to Ystad or Rønne to Køge by BornholmsTrafikken, July 2009

	Cyclists	Others	All
Have looked up information	100%	100%	100%
Number of info. sources	2,73	2,10	2,30
www.bornholm.dk	57%	37%	43%
www.bornholm.info	43%	30%	34%
Internet search engine	30%	30%	30%
Info from family/friends	23%	37%	32%
www.visitdenmark.com/bornholm	23%	6%	12%
www.visitbornholm.no	20%	8%	12%
Brochure / catalogue	20%	17%	18%
www.bornholmhurtigt.dk	13%	6%	9%
Travel agency, tourist info. bureau	13%	6%	9%
www.visitbornholm.se	7%	5%	5%
Internet advertisement	7%	5%	5%
Magasine / newspaper	3%	6%	5%
Advertisement	0%	5%	3%
Other info source	13%	11%	12%
n, no. of responses	30	63	93

Note: Significant differences are marked by *.

Table 20 Types of accommodation used by cyclists and other departing on the routes from Rønne to Ystad or Rønne to Køge by BornholmsTrafikken, July 2009

	Cyclists	Others	All
Camping site	53%	11%	25% *
Holiday centre, rented apartment	17%	32%	27%
With family and friends	17%	17%	17%
Hotel	10%	6%	8%
Rented summerhouse	10%	21%	17%
Youth hostel	7%	3%	4%
Own (summer) house, apartment	0%	8%	5% *
Other accommodation	7%	3%	4%
n, no. of responses	30	63	93

Note: Significant differences are marked by *.

Table 21 Attractions visited by cyclists and other departing on the routes from Rønne to Ystad or Rønne to Køge by BornholmsTrafikken, July 2009

	Cyclists	Others	All
Smoke houses	77%	75%	75%
Hammershus	67%	76%	73%
Østerlars Rundkirke	43%	49%	47%
Glass blowers	43%	59%	54%
Almindingen	43%	48%	46%
Art galleries	30%	22%	25%
Paradisbakkerne	27%	32%	30%
Helligdomsklipperne	23%	48%	40%
Rytterknægten	20%	22%	22%
Farm museet Melstedgård	13%	6%	9%
Runic stones	13%	11%	12%
Natur Bornholm	10%	29%	23% *
Hjorths museum	10%	3%	5%
Joboland	7%	24%	18% *
Middelaldercentret	7%	21%	16% *
Bornholm's Art museum	7%	8%	8%
Oluf Høst Museum	7%	6%	6%
Christiansø	7%	16%	13%
Textile workshops	0%	10%	6%
Other sights	20%	19%	19%
n, no. of responses	30	63	93

Note: Significant differences are marked by *.

Table 22 Activities undertaken by cyclists and other departing on the routes from Rønne to Ystad or Rønne to Køge by BornholmsTrafikken, July 2009 (ranked by overall percentage)

Activities	Cyclists	Others	Difference	All	t	Sig.	Sig. level
Relaxed	90%	90%	0%	90%	-0,07	,943	
Enjoyed nature	90%	89%	1%	89%	0,16	,873	
Was on the beach	90%	81%	9%	84%	1,10	,272	
Dined at restaurants	87%	75%	12%	78%	1,32	,190	
Drove trips (by car)	40%	87%	-47%	72%	-5,40	,000	**
Shopped	67%	73%	-6%	71%	-0,63	,533	
Visited historical places	83%	57%	26%	66%	2,54	,013	*
Experienced ports	77%	60%	16%	66%	1,55	,123	
Was with family, kids	60%	62%	-2%	61%	-0,17	,862	
Visited attractions	60%	56%	4%	57%	0,40	,690	
Visited cultural places	67%	48%	19%	54%	1,73	,087	
Barbecue, grilled	50%	48%	2%	48%	0,21	,832	
Cycled	100%	0%	100%	32%			
Visited friends / family	27%	32%	-5%	30%	-0,49	,622	
Sailed	13%	27%	-14%	23%	-1,47	,144	
Was at a concert	17%	6%	10%	10%	1,58	,118	
Played golf	3%	10%	-6%	8%	-1,05	,295	
Participated in sports	3%	10%	-6%	8%	-1,05	,295	
Fished	7%	6%	0%	6%	0,06	,954	
Other activities	3%	5%	-1%	4%	-0,31	,754	
Cinema	3%	3%	0%	3%	0,04	,968	
At guided trips	0%	5%	-5%	3%	-1,21	,229	
Fitnesscenter, Spa, Wellness	3%	2%	2%	2%	0,54	,592	
n, no. of responses	30	63		93			

Note: Significant differences are marked by *.

Table 23 Activities undertaken by cyclists and other departing on the routes from Rønne to Ystad or Rønne to Køge by BornholmsTrafikken, July 2009 (ranked by significance of differences between cyclists and others)

Activities	Cyclists	Others	Difference	All	t	Sig.	Sig. level
Visited historical places	83%	57%	26%	66%	2,54	,013	*
Visited cultural places	67%	48%	19%	54%	1,73	,087	
Was at a concert	17%	6%	10%	10%	1,58	,118	
Experienced ports	77%	60%	16%	66%	1,55	,123	
Dined at restaurants	87%	75%	12%	78%	1,32	,190	
Was on the beach	90%	81%	9%	84%	1,10	,272	
Fitnesscenter, Spa, Wellness	3%	2%	2%	2%	0,54	,592	
Visited attractions	60%	56%	4%	57%	0,40	,690	
Barbecue, grilled	50%	48%	2%	48%	0,21	,832	
Enjoyed nature	90%	89%	1%	89%	0,16	,873	
Fished	7%	6%	0%	6%	0,06	,954	
Cinema	3%	3%	0%	3%	0,04	,968	
Cycled	100%	0%	100%	32%			
Relaxed	90%	90%	0%	90%	-0,07	,943	
Was with family, kids	60%	62%	-2%	61%	-0,17	,862	
Other activities	3%	5%	-1%	4%	-0,31	,754	
Visited friends / family	27%	32%	-5%	30%	-0,49	,622	
Shopped	67%	73%	-6%	71%	-0,63	,533	
Played golf	3%	10%	-6%	8%	-1,05	,295	
Participated in sports	3%	10%	-6%	8%	-1,05	,295	
At guided trips	0%	5%	-5%	3%	-1,21	,229	
Sailed	13%	27%	-14%	23%	-1,47	,144	
Drove trips (by car)	40%	87%	-47%	72%	-5,40	,000	**
n, no. of responses	30	63		93			

Note: Significant differences are marked by *.

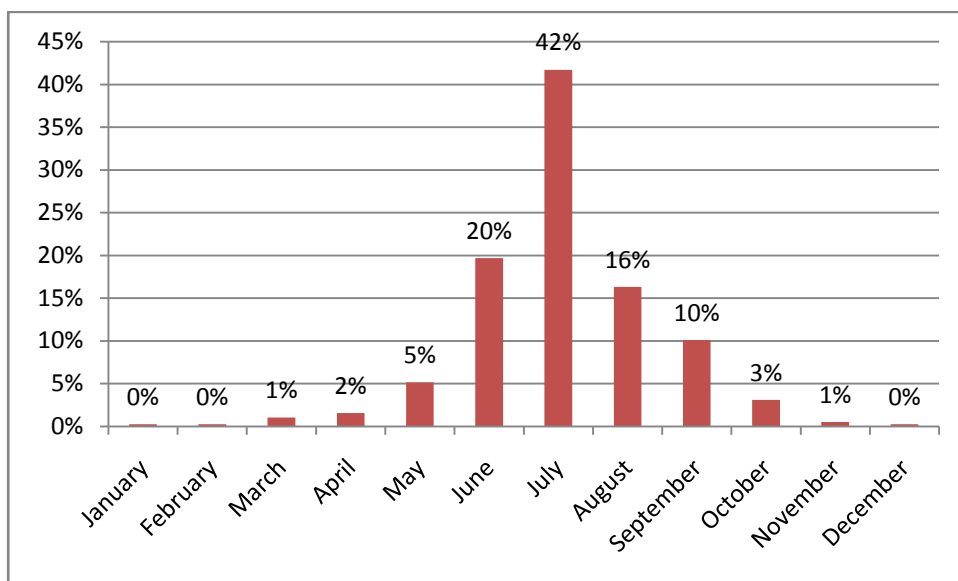
3.4 Insights from an elder survey among visitors to Bornholm (2002)

Overall, in 2002 a quarter of the visitors to Bornholm cycled during their stay, although this may not have been their main activity. Cycling was and is concentrated in the third quarter of the year. July-August-September accounted for two thirds of cycling activity, while only 43% of the non-cyclist came in the third quarter.

Table 24 Cyclists on Bornholm by time of year (2002)

Quarter	Cyclist		Total
	No	Yes	
1st 2002	15%	2%	12%
2nd 2002	26%	27%	26%
3rd 2002	43%	67%	49%
4th 2002	16%	4%	13%
Total	100%	100%	100%
n, responses	1173	386	1559
Split	75%	25%	100%

Figure 16 Cyclists on Bornholm by month of year, according to survey (2002)



Half (52%) of those travelling on the route Rønne-Sassnitz cycled during their stay on Bornholm. Those travelling on the mentioned route are Germans.

Table 25 Cyclists on Bornholm by ferry route (2002)

Route	Cyclist		Total
	No	Yes	
Rønne-Ystad	81%	19%	100%
Rønne - Sealand	86%	14%	100%
Rønne - Sassnitz	48%	52%	100%
Total	75%	25%	100%
n, responses	1173	386	1559

Disregarding stays of more than 30 days, those who cycled stayed for more days than those who did not cycle. The average length of stay was over 9 days for those who cycled but only just under 6 days for those who did not.

Table 26 Length of stay for cycling and non-cycling visitors to Bornholm (2002)

Days	Cyclist		Total
	No	Yes	
1-2	18%	3%	14%
3-4-5	39%	21%	35%
6-7-8	28%	33%	30%
9-14	12%	32%	17%
15-30	3%	10%	5%
Total	100%	100%	100%
Average	5,8	9,4	6,7

There is an (even) higher percentage of cyclists among foreign visitors than among Danish visitors or Bornholm.

Table 27 Percentage of cyclists by nationality among visitors to Bornholm (2002)

Nationality	Cyclist		Total	n
	No	Yes		
Denmark	86%	14%	100%	1057
Sweden	69%	31%	100%	151
Germany	46%	54%	100%	275
Norway	45%	55%	100%	49
Poland	57%	43%	100%	7
Others	60%	40%	100%	20
Total	75%	25%	100%	1559
Responses	1173	386	1559	

Over half, i.e. 54%, of those who used a bicycle during their stay at Bornholm used their own bicycle, while 38% rented one, and 8% borrowed one.

Table 28 Use of own, rented or borrowed bicycle during stay at Bornholm (2002)

	n	Percent
Own	141	54%
Rent	98	38%
Borrow	21	8%
Total	260	100%

The most common type of accommodation overall as well as among cycling visitors was and is summer cottages (summerhouses), followed by hotels with camping at third place. However, within types of accommodation, the largest share of cyclists on Bornholm are found within camping and youth hostels (43% and 42%, respectively).

Table 29 Cyclists and non-cyclists on Bornholm by type of accommodation (2002)

Type of accommodation	Cyclist		Total	Type of accommodation	Cyclist		Total
	No	Yes			No	Yes	
Hotel	18%	22%	19%	Hotel	72%	28%	100%
Holiday centre	4%	5%	4%	Holiday centre	70%	30%	100%
Summer house	28%	42%	32%	Summer house	67%	33%	100%
Camping	6%	14%	8%	Camping	57%	43%	100%
Youth hostel	2%	3%	2%	Youth hostel	58%	42%	100%
Other	42%	14%	35%	Other	90%	10%	100%
Total, %	100%	100%	100%	Total, %	75%	25%	100%
Total, n	1173	386	1559	Total, n	1173	386	1559

Note: Here summer house includes not only rented summer house, but also own and borrowed. "Other comprise VFR, visiting friends and relatives".

Overall, 23% of cyclists cycled between types of accommodation. However, among those who cycled at least every second day during their stay on Bornholm, the share of nomadic cyclists were higher, namely 28%. – Overall, 65% of those who cycled on Bornholm, cycled at least every second day during their stay. However, as much as 79% of those, who cycled between accommodations, cycled at least every second day during their visit.

Table 30 Cycling between accommodations among frequent and in-frequent cyclists

Cycled between accommodations	At least 50% cycle days		Total, n	Cycled between accommodations	At least 50% cycle days		Total
	No	Yes			No	Yes	
Yes	12	46	58	Yes	13%	28%	23%
No	77	120	197	No	87%	72%	77%
Total, n	89	166	255	Total, %	100%	100%	100%

Cycled between accommodations	At least 50% cycle days		Total	Cycled between accommodations	At least 50% cycle days		Total
	No	Yes			No	Yes	
Yes	21%	79%	100%	Yes	5%	18%	23%
No	39%	61%	100%	No	30%	47%	77%
Total, %	35%	65%	100%	Total, %	35%	65%	100%

Finally, 18% of all those who cycle during their visit to Bornholm are “hard core cycling holiday-makers” (79%*23%=18%).

The highest percentage of nomadic cyclists are found among those staying at camping sites.

Table 31 Percentage of nomadic cycling tourists by type of accommodation

Type of accommodation	Cycled between accommodations			Total, n	Total, %
	Yes	No	Total		
Hotel	26%	74%	100%	57	22%
Holiday centre	0%	100%	100%	10	4%
Summer house	18%	82%	100%	124	49%
Camping	41%	59%	100%	29	11%
Youth hostel	25%	75%	100%	8	3%
Other	26%	74%	100%	27	11%
Total	23%	77%	100%	255	100%
Total	58	197	255		

All in all, there are some 600.000 visitors on Bornholm. Around 25% of these visitors cycle, i.e. some 150.000. – Some 18% of these corresponding to 27.000 are hard core nomadic cycling holiday-makers.

95% of those who used a cycle during their visit to Bornholm used cycle trails with signs. There were no significant difference in this respect between frequent cyclists and other cycling visitors.

Table 32 Percentage of those who cycled on Bornholm who used cycle trails with signs

Used cycle trails with signs	At least 50% cycle days		Total
	No	Yes	
Yes	96%	94%	95%
No	4%	6%	5%
Total, n	100%	100%	100%
Total, n	91	168	259

Those who did use cycle trails with signs, which is the vast majority, did so 89% of the times. This percentage was a little (but insignificantly) higher for those who cycled frequently, i.e. at least every second day.

Table 33 Frequency of usage of cycle trails with signs among visiting cyclists on Bornholm

Used cycle trails with signs	At least 50% cycle days		Total
	No	Yes	
x > 90%	44%	49%	48%
90% > x > 50%	40%	42%	41%
x < 50%	16%	8%	11%
Total, n	100%	100%	100%
Total, n	86	158	244

Overall, more than 99%, i.e. all respondents except a single one, found the signing of cycle trails on Bornholm at least satisfactory. Among those who cycled at least every second day, 92% (54+38) thought the cycle trail signing were good or very good.

Table 34 Satisfaction with signs at cycle trails among visiting cyclists on Bornholm

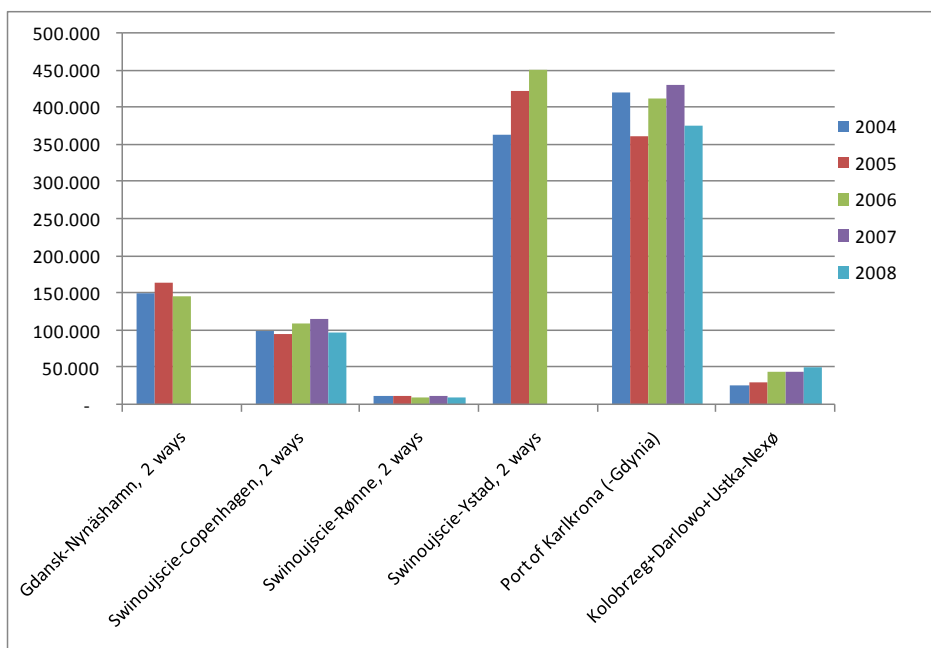
Satisfaction with signs	At least 50% cycle days		Total
	No	Yes	
Very good	41%	54%	50%
Good	41%	38%	39%
Satisfactory	17%	7%	11%
Unsatisfactory	0%	1%	0%
Total, n	100%	100%	100%
Total, n	87	160	247

4 Poland

4.1 General statistics

The three largest ferry ports in Poland by number of passengers travelling in and out of the port are Swinoujscie (with routes to Ystad, Copenhagen and, Rønne on Bornholm) Gdynia (with route to Karlskrona in Sweden) and Gdansk (route to Nynäshamn in Sweden). Kolobrzeg is a medium sized port, with one daily roundtrip in the high season to Nexø (Bornholm). Utska had two weekly roundtrips to Nexø in 2009 (Wednesday and Saturday) and one weekly roundtrip from Darlowo (on Tuesdays) to Nexø in the high season. Utska and Darlowo are small ports, by number of passengers.

Figure 17 Passengers on ferry routes from/to Poland, 2004-2008

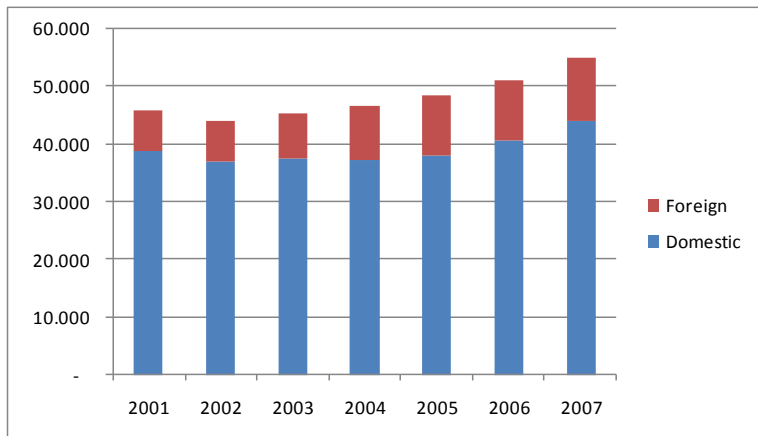


Sources: Statistics Poland (stat.gov.pl), Statistics Denmark (statistikbanken.dk), Transportgruppen.se.

West Pomerania, Zachodniopomorskie (main city: Szczecin), accounts for the greatest number of bednights of the 16 Polish voivodeships, namely almost 10 million out of almost 55 million in all of Poland, or 17%, in 2007. 22% of the bednights in West Pomerania is accounted for by foreigners, which is a little above the 20% Poland overall.

The number of registered bednights in Poland has increased in recent years, up to 55 million in 2007, of which 80% are domestic, 20% foreign.

Figure 18 Number of bednights in Poland, 2001-2007, domestic and foreign



Source: Based on data from Central Statistical Office, Poland.

Figure 19 Arrivals of non-resident tourists in collective tourism accommodation, by country (2,4 million foreigners)

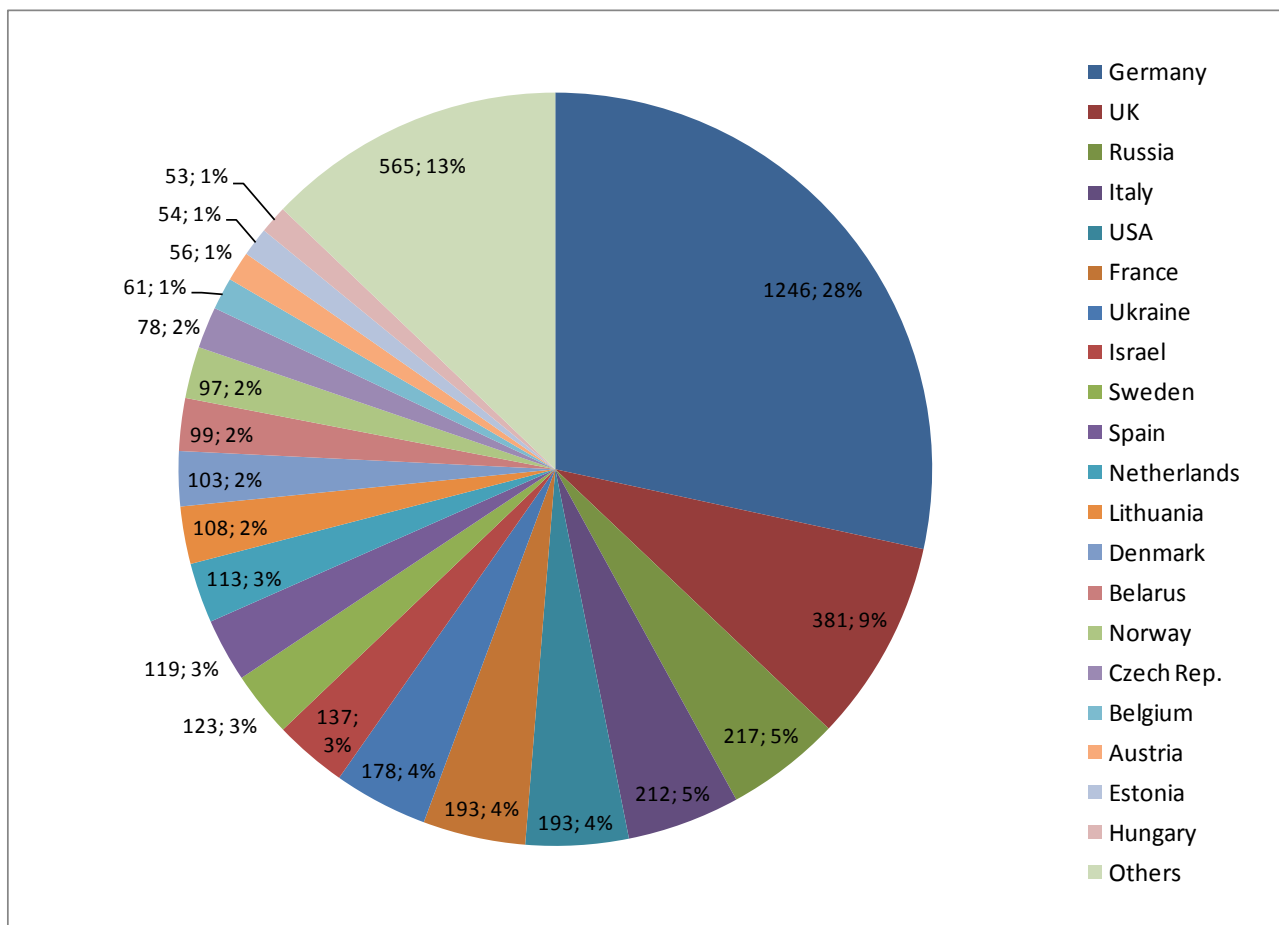


Table 35 Arrivals of non-resident tourists in collective tourism accommodation, by country (*000)

		2002	2003	2004	2005	2006	2007	2007 %
1	Germany	1090	1167	1379	1487	1306	1246	28%
2	UK	158	165	217	275	334	381	9%
3	Russia	163	171	171	198	227	217	5%
4	Italy	127	150	185	212	217	212	5%
5	USA	161	157	200	204	210	193	4%
6	France	133	153	182	207	194	193	4%
7	Ukraine	187	163	154	151	169	178	4%
8	Israel	100	96	123	126	129	137	3%
9	Sweden	85	87	101	113	120	123	3%
10	Spain	51	58	78	103	110	119	3%
11	Netherlands	91	97	117	123	118	113	3%
12	Lithuania	54	63	74	76	89	108	2%
13	Denmark	74	89	98	102	99	103	2%
14	Belarus	111	103	91	96	101	99	2%
15	Norway	48	61	67	74	86	97	2%
16	Czech Rep.	45	50	61	66	73	78	2%
17	Belgium	43	44	55	59	58	61	1%
18	Austria	48	52	58	60	59	56	1%
19	Estonia	22	23	29	40	50	54	1%
20	Hungary	26	37	50	57	50	53	1%
	Others	330	347	446	486	517	565	13%
	TOTAL	3145	3332	3934	4310	4314	4387	100%

		2002	2003	2004	2005	2006	2007
1	Germany	35%	35%	35%	35%	30%	28%
2	UK	5%	5%	6%	6%	8%	9%
3	Russia	5%	5%	4%	5%	5%	5%
4	Italy	4%	5%	5%	5%	5%	5%
5	USA	5%	5%	5%	5%	5%	4%
6	France	4%	5%	5%	5%	4%	4%
7	Ukraine	6%	5%	4%	4%	4%	4%
8	Israel	3%	3%	3%	3%	3%	3%
9	Sweden	3%	3%	3%	3%	3%	3%
10	Spain	2%	2%	2%	2%	3%	3%
11	Netherlands	3%	3%	3%	3%	3%	3%
12	Lithuania	2%	2%	2%	2%	2%	2%
13	Denmark	2%	3%	2%	2%	2%	2%
14	Belarus	4%	3%	2%	2%	2%	2%
15	Norway	2%	2%	2%	2%	2%	2%
16	Czech Rep.	1%	2%	2%	2%	2%	2%
17	Belgium	1%	1%	1%	1%	1%	1%
18	Austria	2%	2%	1%	1%	1%	1%
19	Estonia	1%	1%	1%	1%	1%	1%
20	Hungary	1%	1%	1%	1%	1%	1%
	Others	10%	10%	11%	11%	12%	13%
	TOTAL	100%	100%	100%	100%	100%	100%

Source: Based on data from intur.com.pl.

Table 36 Bednights by voivodeship in Poland, 2007, domestic and foreign

Voivodeship	Domestic	Inbound	Total	Total %	Inbound %
Zachodniopomorskie (Szczecin)	7.458.371	2.105.861	9.564.232	17%	22%
Malopolskie (Kraków)	5.745.099	2.268.918	8.014.017	13%	28%
Pomorskie (Gdansk)	5.418.395	738.578	6.156.973	12%	12%
Dolnoslaskie (Wroclaw)	3.958.394	1.309.828	5.268.222	9%	25%
Mazowieckie (Warsaw)	3.282.161	1.534.034	4.816.195	7%	32%
Slaskie	3.489.881	664.909	4.154.790	8%	16%
Kujawsko-Pomorskie (Bydgoszcz)	2.617.631	212.685	2.830.316	6%	8%
Wielkopolskie (Poznan)	2.265.857	449.271	2.715.128	5%	17%
Warminsko-Mazurskie (Olsztyn)	1.949.765	457.944	2.407.709	4%	19%
Podkarpackie (Rzeszów)	1.622.503	191.696	1.814.199	4%	11%
Lódzkie (Łódź)	1.460.185	258.765	1.718.950	3%	15%
Lubuskie (Gorzów Wlkp)	1.173.574	262.151	1.435.725	3%	18%
Lubelskie (Lublin)	1.251.678	158.604	1.410.282	3%	11%
Swietokrzyskie (Kielce)	1.046.287	72.967	1.119.254	2%	7%
Podlaskie (Białystok)	806.896	135.917	942.813	2%	14%
Opolskie (Opole)	488.945	95.972	584.917	1%	16%
Total Poland, 2007	44.035.622	10.918.100	54.953.722	100%	20%

Source: Based on data from Central Statistical Office, Poland.

The average length of stay was 5,7 nights per guest in West Pomarania in 2007, which was somewhat the average length of stay in accommodations in Poland overall. The length of stay was a little shorter for foreign visitors than for domestic guests in West Pomarania which was also the case in Poland overall.

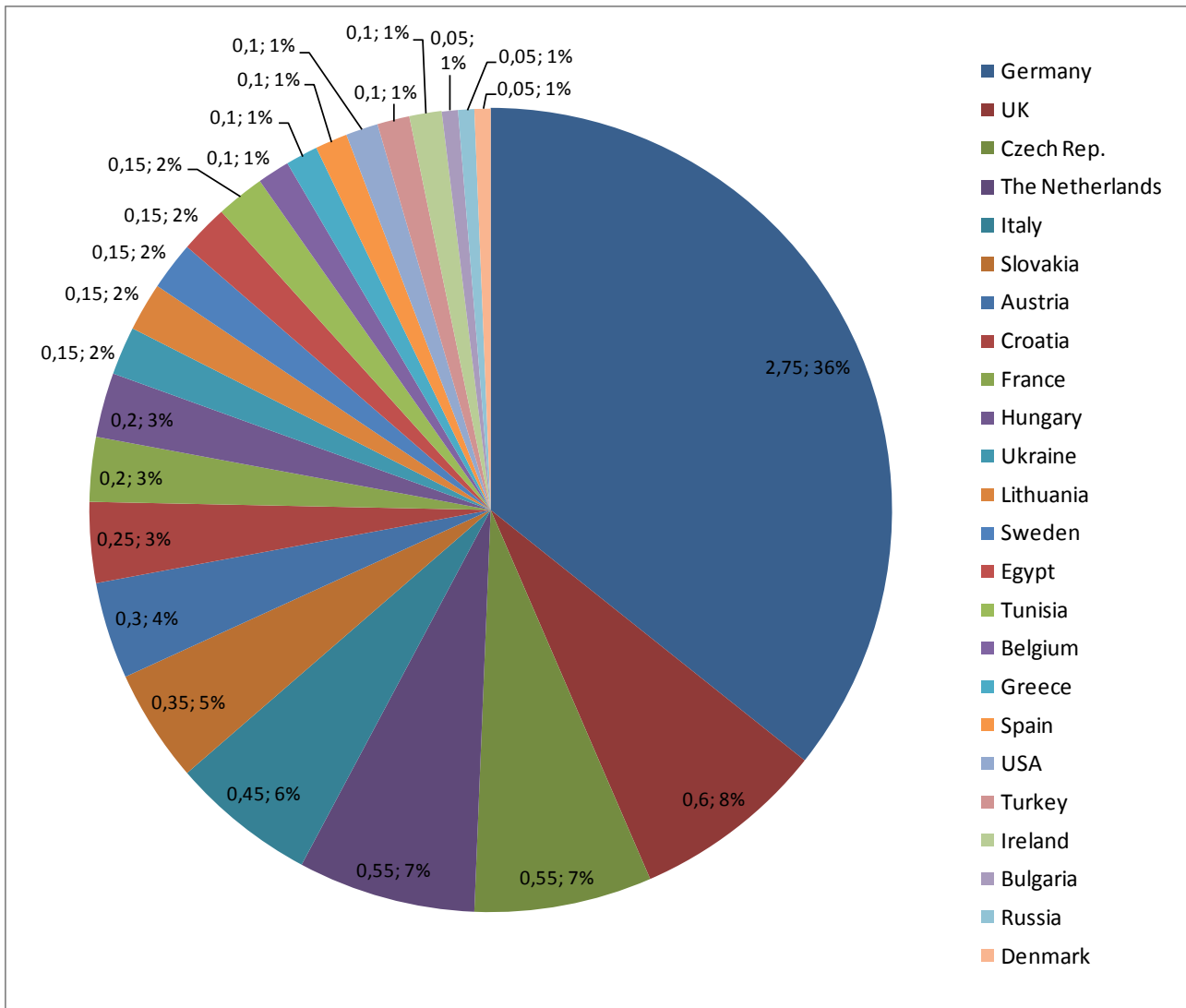
“The highest unemployment rate was recorded in Warmińsko-Mazurskie (19.1%), Zachodniopomorskie (15.5%), and Kujawsko-Pomorskie (15.2%), while the lowest – in Wielkopolskie (8.1%), Mazowieckie (8.3%) and Śląskie (8.5%) voivodships.”¹

The number of outbound tourist trips by Polish residents was 7.3 million in 2006, of which 2.75 million (36%) went to Germany. Sweden ranked as number 13 with 150.000 visitors from Poland (2%), and Denmark ranked as number 24 with less than 100.000 arrivals from Poland, perhaps even less than 50.000, corresponding to 1%.² – Bornholm had about 30.000 arrivals from Poland per year 2006-2008, cf. Table 11. The share of Bornholm / Denmark, and Sweden is larger in the northern part of Poland than in Poland overall, though.

¹ www.stat.gov.pl/cps/rde/xbcr/gus/PUBL_as_poland_quarterly_statistics_1_2009.pdf

² www.intur.com.pl/itenglish/departur.htm - There were no data in 2006 for Bulgaria, Russia and Denmark.

Figure 20 Outbound trips from Poland by destination countries (2006)



Source: Based on data from intur.com.pl.

4.2 West Pomeranian Voivodeship

Table 37 Number of guests, number of nights and length of stay in West Pomeranian Voivodeship and in all of Poland, 2007

Region	Number of guests		
	Domestic	Inbound	Total
Zachodniopomorskie	1.260.217	412.063	1.672.280
All of Poland	14.559.756	4.387.404	18.947.160
Zachodniopomorskie %	9%	9%	9%
Region	Number of nights		
	Domestic	Inbound	Total
Zachodniopomorskie	7.458.371	2.105.861	9.564.232
All of Poland	44.035.622	10.918.100	54.953.722
Zachodniopomorskie %	17%	19%	17%
Region	No. of nights/guest		
	Domestic	Inbound	Total
Zachodniopomorskie	5,9	5,1	5,7
All of Poland	3,0	2,5	2,9

Table 38 Number of guests and number of nights West Pomeranian Voivodeship, 2007

All establishments	Number of guests			Number of nights		
	Total	Domestic	Inbound	Total	Domestic	Inbound
kołobrzeski	309.387	209.711	99.676	2.743.069	1.838.647	904.422
kamieński	204.613	168.724	35.889	1.379.461	1.186.995	192.466
gryficki	155.530	137.920	17.610	1.116.198	973.165	143.033
ślawieński	105.356	97.725	7.631	1.053.862	987.075	66.787
m. Świnoujście	122.007	85.020	36.987	979.213	690.659	288.554
koszaliński	139.777	118.875	20.902	931.927	811.675	120.252
m. Szczecin	375.637	215.222	160.415	669.445	365.731	303.714
drawski	20.831	19.900	931	112.579	107.401	5.178
walecki	27.744	24.527	3.217	93.410	86.204	7.206
stargardzki	31.501	27.842	3.659	89.689	82.141	7.548
gryfiński	24.029	21.175	2.854	68.487	57.477	11.010
m. Koszalin	31.808	26.074	5.734	60.128	50.860	9.268
szczecinecki	16.545	14.281	2.264	50.675	44.522	6.153
policki	27.035	20.459	6.576	47.863	35.451	12.412
świdwiński	7.537	5.578	1.959	42.093	26.770	15.323
myśliborski	19.249	16.519	2.730	40.980	34.189	6.791
goleniowski	28.949	27.675	1.274	37.557	35.281	2.276
białogardzki	13.759	12.461	1.298	29.477	26.488	2.989
choszczeński	5.387	5.387	-	10.783	10.783	-
pyrzycki	4.982	4.542	440	4.992	4.542	450
łobeski	617	600	17	2.344	2.315	29
ZACHODNIOPOMORSKIE	1.672.280	1.260.217	412.063	9.564.232	7.458.371	2.105.861

Table 39 Number of guests and number of nights West Pomeranian Voivodeship, 2007 (percent)

	Number of guests			Number of nights			Number of nights		
	Total	Domestic	Inbound	Total	Domestic	Inbound	Total	Domestic	Inbound
kołobrzesci	18,5%	16,6%	24,2%	28,7%	24,7%	42,9%	100%	67%	33%
kamieński	12,2%	13,4%	8,7%	14,4%	15,9%	9,1%	100%	86%	14%
gryficki	9,3%	10,9%	4,3%	11,7%	13,0%	6,8%	100%	87%	13%
slawieński	6,3%	7,8%	1,9%	11,0%	13,2%	3,2%	100%	94%	6%
m. Świnoujście	7,3%	6,7%	9,0%	10,2%	9,3%	13,7%	100%	71%	29%
koszaliński	8,4%	9,4%	5,1%	9,7%	10,9%	5,7%	100%	87%	13%
m. Szczecin	22,5%	17,1%	38,9%	7,0%	4,9%	14,4%	100%	55%	45%
drawski	1,2%	1,6%	0,2%	1,2%	1,4%	0,2%	100%	95%	5%
walecki	1,7%	1,9%	0,8%	1,0%	1,2%	0,3%	100%	92%	8%
stargardzki	1,9%	2,2%	0,9%	0,9%	1,1%	0,4%	100%	92%	8%
gryfiński	1,4%	1,7%	0,7%	0,7%	0,8%	0,5%	100%	84%	16%
m. Koszalin	1,9%	2,1%	1,4%	0,6%	0,7%	0,4%	100%	85%	15%
szczecinecki	1,0%	1,1%	0,5%	0,5%	0,6%	0,3%	100%	88%	12%
policki	1,6%	1,6%	1,6%	0,5%	0,5%	0,6%	100%	74%	26%
świdwiński	0,5%	0,4%	0,5%	0,4%	0,4%	0,7%	100%	64%	36%
myśliborski	1,2%	1,3%	0,7%	0,4%	0,5%	0,3%	100%	83%	17%
goleniowski	1,7%	2,2%	0,3%	0,4%	0,5%	0,1%	100%	94%	6%
białogardzki	0,8%	1,0%	0,3%	0,3%	0,4%	0,1%	100%	90%	10%
choszचेński	0,3%	0,4%	0,0%	0,1%	0,1%	0,0%	100%	100%	0%
pyrzycki	0,3%	0,4%	0,1%	0,1%	0,1%	0,0%	100%	91%	9%
łobeski	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	100%	99%	1%
Zachodniopomorskie	100,0%	100,0%	100,0%	100,0%	100,0%	100,0%	100%	78%	22%

Kołobrzesci (including the city of Kołobrzeg) accounted of 29% of the bednights in Zachodniopomorskie in 2007, while koszaliński and the city of m. Koszalin accounted for 10.3%. Foreigners account for a very high share of all bednights in Kołobrzesci, namely 43%, while Polish visitors account for 57%. In koszaliński and the city of m. Koszalin domestic visitors account for the vast majority of bednights, namely around 87%. Tourism in and around Koszalin is thus largely domestic for the time being.

Figure 21 A tourists view of Kołobrzeg



Source: Tourist map of Kołobrzeg.

Note: Camping site, train station and ferry departure site for Bornholm marked.

The hotels in Mielno are most active during the summer months, as the town is set on the coast of the Baltic Sea. It is known as a popular summer holiday resort with excellent clean and wide beaches. Situated next to Koszalin, one of the main towns of Western Pomerania, Mielno is easily accessible. Staying at a hotel in Mielno guarantees you a good rest, with lots of recreational options nearby. Apart from the sea with its sandy beaches, there is the quite large Lake Jamno in Mielno.

<http://www.staypoland.com/mielno-hotels.asp>

In Kołobrzeg 51% of the 2.7 million bednights are accounted for by spa centres, another 9% by hotels, and 26% by holiday centres. Camping accounted for 2%. Foreigners accounted for 23% of the bednights at the camping site(s).

Table 40 Number of guests, number of bednights and average length of stay by type of accommodation in Kolobrzewski, 2007

kolobrzewski		Number of guests		Number of nights		Inbound	Split of	Nights of stay, ave.	
Type of establish	Hotel cate	Total	Inbound	Total	Inbound	% of nights	bednights	Total	Inbound
All establishments		309.387	99.676	2.743.069	904.422	33%	100%	8,9	9,1
Hotels	all	58.312	28.028	246.189	160.392	65%	9%	4,2	5,7
Hotels	****	16.575	3.875	61.578	18.368	30%	2%	3,7	4,7
Hotels	***	39.635	23.111	176.577	136.875	78%	6%	4,5	5,9
Hotels	**	2.102	1.042	8.034	5.149	64%	0%	3,8	4,9
Motels		567	23	668	31	5%	0%	1,2	1,3
Boarding houses		5.581	2.888	50.501	33.603	67%	2%	9,0	11,6
Other hotel-type		7.447	4.404	47.025	40.215	86%	2%	6,3	9,1
Halls/school dormitories		1.771	42	8.073	76	1%	0%	4,6	1,8
Holiday centres		79.649	14.665	722.684	138.193	19%	26%	9,1	9,4
Children holiday centres		8.642	-	88.408	-	0%	3%	10,2	
Training-recreational centre		10.552	1.296	84.854	12.629	15%	3%	8,0	9,7
Guest houses for artists, v		1.223	-	8.570	-	0%	0%	7,0	
Public tourist cottages		1.245	4	9.527	28	0%	0%	7,7	7,0
Camping sites		14.670	4.257	65.011	14.875	23%	2%	4,4	3,5
Tent camp sites		1.098	68	4.370	278	6%	0%	4,0	4,1
Spa centres		115.900	43.871	1.395.243	503.709	36%	51%	12,0	11,5
Other facilities		2.730	130	11.946	393	3%	0%	4,4	3,0

Source: Based on data from Central Statistical Office and Institute of Tourism, Poland.

In Koszalin holiday centres accounted for 65% of the almost one million bednights. Camping sites accounted for 3%. Foreigners accounted for 13% of the bednights at the camping sites in Koszalin, i.e. the area around Koszalin. There were three times as many bednights in Kolobrzewski as in Koszalin (i.e. Koszalin County not including the City of Koszalin).

Table 41 Number of guests, number of bednights and average length of stay by type of accommodation in Koszalin, 2007

koszaliński		Number of guests		Number of nights		Inbound	Split of	Nights of stay, ave.	
Type of establish	Hotel cate	Total	Inbound	Total	Inbound	% of nights	bednights	Total	Inbound
All establishments		139.777	20.902	931.927	120.252	13%	100%	6,7	5,8
Hotels	all	38.965	13.917	98.851	52.854	53%	11%	2,5	3,8
Hotels	****	9.912	3.963	14.885	6.328	43%	2%	1,5	1,6
Hotels	***	29.053	9.954	83.966	46.526	55%	9%	2,9	4,7
Motels		1.285	93	3.896	230	6%	0%	3,0	2,5
Boarding houses		2.808	218	10.940	741	7%	1%	3,9	3,4
Other hotel-type		372	113	1.111	466	42%	0%	3,0	4,1
Halls/school dormitories		298	-	631	-	0%	0%	2,1	
Holiday centres		68.404	3.253	609.508	34.909	6%	65%	8,9	10,7
Children holiday centres		3.835	-	44.416	-	0%	5%	11,6	
Training-recreational centre		7.141	475	49.526	772	2%	5%	6,9	1,6
Public tourist cottages		309	-	1.969	-	0%	0%	6,4	
Camping sites		5.844	783	24.678	3.331	13%	3%	4,2	4,3
Tent camp sites		2.651	39	13.447	343	3%	1%	5,1	8,8
Spa centres		6.209	1.881	69.746	26.278	38%	7%	11,2	14,0
Other facilities		1.656	130	3.208	328	10%	0%	1,9	2,5

Source: Based on data from Central Statistical Office and Institute of Tourism, Poland.

Half of the 60.000 bednights in Koszalin city was accounted for by hotels. Foreigners accounted for over 40% of the bednights at the three star hotels in Koszalin city.

Table 42 Number of guests, number of bednights and average length of stay by type of accommodation in Koszalin city, 2007

m. Koszalin		Number of guests		Number of nights		Inbound	Split of	Nights of stay, ave.	
Type of establish	Hotel cat	Total	Inbound	Total	Inbound	% of nights	bednights	Total	Inbound
All establishments		31.808	5.734	60.128	9.268	15%	100%	1,9	1,6
Hotels	all	19.270	5.294	29.413	8.443	29%	49%	1,5	1,6
Hotels	***	13.488	5.165	19.922	8.108	41%	33%	1,5	1,6
Hotels	**	5.782	129	9.491	335	4%	16%	1,6	2,6
Motels		6.468	324	9.304	629	7%	15%	1,4	1,9
Other hotel-type		1.893	53	7.927	63	1%	13%	4,2	1,2
Halls/school dormitories		3.049	62	4.496	132	3%	7%	1,5	2,1
Other facilities		1.128	1	8.988	1	0%	15%	8,0	1,0

Source: Based on data from Central Statistical Office and Institute of Tourism, Poland.

87% of the bednights in Koszalin are domestic, both at camping sites and for all types of accommodation under one, it must be assumed that around 87% of the cyclists staying overnight at public accommodations will be Polish people. – The largest share of cyclists at the cycle trails around a major city as Koszalin is likely to be accounted for by excursionists, i.e. local residents. In Brandenburg around Berlin the ratio of excursionists to overnight cyclists is 2.5 : 1. - Lumsdon et al (2007) found that on the North Sea Cycle Route, 30% were holiday cyclists or short-break cyclists, while the rest, 70%, were excursionists. This gives a ratio of overnight holiday/short-break cyclists of 2.3: 1. – Around Koszalin the same may be the case (as around Berlin, which in turn is about the same as for the North Sea Cycle Route). Therefore, since Poles outnumber foreigners when it comes to overnight visitors - by 87 to 13) it must be assumed that Poles will account for around 96% of the cyclists on the cycle trail around Koszalin.

Table 43 Residents vs. holiday cyclings, and estimated percentage of Poles on the cycle trails around Koszalin

Segment	Split	Percent
Local residents	250	71%
Polish holiday cyclists	87	25%
Foreign holiday cyclists	13	4%
Total	350	100%

Note: Own estimate.

The estimated split of cyclists on the cycle trails around Koszalin is thus expected to be 71% residents, 25% other Polish guests, and 4% foreigners. Among the foreigners, 3 out of 4 must be assumed to be Germans.

Figure 22 Koszalin, Kolobrzeg, Nexø, Rønne, Ystad, Foteviken, Malmø/Copenhagen



Source: Tourist map of Kolobrzeg.

Note: The routes Kolobrzeg-Nexø and Rønne-Ystad have been added. So have Gdansk, Poznan and Warsaw

Figure 23 Koszalin – Mielno: 13 km, 56 minutes by bike



Source: Viamichelin.com.

Figure 24 Mielno – Kołobrzeg: 36 km, 2 hours 34 minutes



Source: Viamichelin.com.

In Poland, the summer holiday period starts about 20 June and ends about 1 September. Furthermore, students at universities have vacation during September as well.³

4.3 Insights from a survey among Polish visitors leaving Bornholm (2006): How are Polish cycling tourist on Bornholm different than other Polish visitors to Bornholm?

The below is based on a survey of Polish visitors to Bornholm who based on a departure survey in the port of Nexø on Bornholm in the summer of 2006. The survey consisted of 462 respondents, of which 98 or 21% were cycling tourists, i.e. they cycled on Bornholm on either their own or a rented bicycle.

Overall, 75% of the Polish visitors via the port of Nexø are one day visitors, whereas 25% stay at least one night. 82% of the cycle tourists stay at least one night on Bornholm, whereas only 10% of other Polish visitors stayed overnight on Bornholm.

All in all $57\%+14\%=71\%$ of the Polish visitors to Bornholm went on a guided bus tour around Bornholm, according to the 2006-survey. However, only $19\%+4\%=21\%$ of the cycle tourists went on a bus tour around the island, this was the case for as much as $67\%+17\%=84\%$ of the other Polish visitors.

There was a bigger tendency for the Polish cyclists to visit a museum (8%) than among other Polish visitors (4%). Also a larger percentage of Polish cyclists visit the butterfly park in Nexø (13%) whereas only 6% of other Polish visitors to Bornholm (via Nexø) do so.

The two groups, Polish cyclists and other Polish visitors to Bornholm, are equal with respect to visiting the pleasure park and funfair Joboland (4%), the Medieval Centre (4%), and they do shopping to the same extent (18% and 17%, respectively).

³ http://en.wikipedia.org/wiki/Summer_vacation

Table 44 Activities of cyclists and other visitors to Bornholm via Nexø from Poland

Activity	Cyclists	Others	All
	Yes %	Yes %	Yes %
Stayed at least one night	82%	10%	25%
Island bustour without NaturBornholm	19%	67%	57%
Island bustour with NaturBornholm	4%	17%	14%
Joboland	4%	4%	4%
Medieval Centre	4%	4%	4%
Visited a museum	8%	4%	5%
Visited the butterflypark in Nexø	13%	6%	7%
Shopping	18%	17%	17%
n, number of respondents	95	367	462
Split of respondents	21%	79%	100%

Source: Based on departure survey in Nexø, 2006.

Among the Polish cycle tourist on Bornholm, who came via Nexø, 43% came by car, 28% came by train, and 27% cycled to the ferry in Kolobrzeg (or in Darlowo).

Table 45 Means of transport to the ferry in Poland, before transfer by to Nexø

	Cyclist		Total
	No	Yes	
Car	55%	43%	52%
Bus	24%	1%	19%
Train	12%	28%	16%
Bicycle	2%	27%	7%
Motor cycle	1%	0%	1%
Other	5%	1%	4%
Total	100%	100%	100%
Total, n	345	89	434
Split, n	79%	21%	100%

Source: Based on departure survey in Nexø, 2006.

At least 29% - and up to 45% - of the Polish cycle tourists stayed overnight in Kolobrzeg (or Darlowo) before going to Bornholm, whereas this was the case for at least 23% among others. There was a high proportion of non-responses to this question. With the low estimate the

interpretation is, that those who actually stayed overnight in Kolobrzeg (or Darlowo) before going to Bornholm answered the question.

Table 46 Overnight stays in Kolobrzeg (or Darlowo) before sailing to Bornholm

Overnight before	Cyclist		Total
	No	Yes	
Yes	23%	29%	24%
No	32%	36%	33%
No reply	45%	35%	43%
Total, %	100%	100%	100%
Total, n	367	95	462

Excluding non-response:

Overnight before	Cyclist		Total
	No	Yes	
Yes	41%	45%	42%
No	59%	55%	58%
Total, n	100%	100%	100%
Total, n	201	62	263

Source: Based on departure survey in Nexø, 2006.

At least 25% - and up to 39% - of the cycle tourists intended to stay overnight in Kolobrzeg (or Darlowo) when returning to Poland from Bornholm, i.e. a little fewer than on the outbound journey.

Table 47 Overnight stays in Kolobrzeg (or Darlowo) after returning from Bornholm

Overnight after	Cyclist		Total
	No	Yes	
Yes	23%	25%	23%
No	32%	40%	34%
No reply	45%	35%	43%
Total, %	100%	100%	100%
Total, n	367	95	462

Excluding non-response:

Overnight after	Cyclist		Total
	No	Yes	
Yes	41%	39%	41%
No	59%	61%	59%
Total, n	100%	100%	100%
Total, n	201	62	263

Source: Based on departure survey in Nexø, 2006.

Although only 4%+9%=13% of the population in Poland come from the Voivodships Zachodniopomorskie (with Szczecin as the main city) and Wielkopolskie (with Poznan as the main city), as much as 21%+13%=34% of Polish visitors via Nexø come from from these two counties. On the ferry route Rønne-Swinoujscie, which sail on around 11 Saturdays during the summer, including all of July and August, 15%+14%=29% of Polish visitors come from Zachodniopomorskie or Wielkopolskie. Nexø also gets a high share of visitors from Lodzkie (with Lodz as the main city), namely 10%. The capital region, Mazowiechie, accounts for 11% of Polish visitors via Nexø.

Table 48 Split of population, visits to Bornholm via Nexø, visits to Bornholm via Rønne, and interest in Bornholm by Voivodship in Poland (2006)

Voivodship / Amt	Hovedby	Befolkning %	Nexø %	Rønne %	DB info. %
Zachodnio-pomorskie	Szczecin	4%	21%	15%	11%
Wielkopolskie	Poznań	9%	13%	14%	11%
Lubuskie	Gorzów Wielkopolski	3%	3%	2%	3%
Łódzkie	Łódź	7%	10%	3%	4%
Mazowieckie	Warszawa	13%	11%	22%	27%
Pomorskie	Gdańsk	6%	6%	12%	8%
Warmińsko-mazurskie	Olsztyn	4%	3%	1%	2%
Kujawsko-pomorskie	Bydgoszcz	5%	3%	5%	6%
Śląskie	Katowice	12%	9%	8%	8%
Małopolskie	Kraków	9%	5%	4%	5%
Dolnośląskie	Wrocław	8%	5%	8%	8%
Opolskie	Opole	3%	1%	3%	3%
Świętokrzyskie	Kielce	3%	3%	1%	1%
Lubelskie	Lublin	6%	4%	1%	2%
Podlaskie	Białystok	3%	1%	1%	1%
Podkarpackie	Rzeszów	5%	1%	2%	1%
Total		100%	100%	100%	100%

Source: The Polish market for ferry transport to Bornholm, CRT, 2006.

Those Polish visitors who cycle on Bornholm travel around 392 km to get to the port in Poland (typically Kolobrzeg), whereas those who don't cycle on Bornholm travel almost 100 km longer, namely 427 km, to get to the ferry port in Poland. This difference is not significant, given the number of respondents.

There are six Voivodeships, where the cycling visitors to Bornholm are overrepresented compared with the population. For example, Zachodnio-Pomorskie (Szczecin), West Pomeranian Voivodeship, account for 22% of the cycle tourists on Bornholm (2006) whereas this voivodeship has only 4% of the total Population in Poland, which is a ration of 5:1, here called a cycle index of 5,03 cf. below table. The distance from the main city in Zachodnio-Pomorskie, which is Szczecin to Kolobrzeg is 144 km, a trip of 2 hours and 10 minutes by car. Tourists from those six voivodeships with a relatively high proportion of cycling visitors to Bornholm travelled around 343 km in average to get to the ferry port, whereas tourists from the 10 other voivodeships travelled almost 600 km to get to the ferry port. Thus, people who live relatively close to the ferry port have a greater tendency to go to Bornholm, irrespectively of whether or not they cycle on Bornholm. The six voivodeships

with relatively many cycling tourists, who come to Bornholm account for 22+16+7+10+4+7=56% of all Polish cycling tourists on Bornholm. Likewise these six voivodeships account for 57% of non-cycling Polish visitors to Bornholm.

Table 49 Split of Polish cycling and non-cyclist visitors (via Nexø) to Bornholm and population by voivodeship (2006)

Voivodeship	Cyclist		Total	2006 Population	Cycle index	Distance main town	Travel by car
	No	Yes					
Zachodnio-Pomorskie (Szczecin)	21%	22%	21%	4%	5,03	144	2h10
Wielkopolskie (Poznan)	13%	16%	13%	9%	1,80	287	4h22
Pomorskie (Gdansk)	6%	7%	6%	6%	1,29	247	3h58
Dolnoslaskie (Wroclaw)	4%	10%	5%	8%	1,27	460	6h58
Warminsko-Mazurskie (Olsztyn)	2%	4%	3%	4%	1,14	413	6h18
Lodzkie (Lodz)	11%	7%	10%	7%	1,10	504	6h45
Malopolskie (Krakow)	5%	7%	5%	9%	0,87	767	9h06
Lubuskie (Gorzow Wlkp)	3%	2%	3%	3%	0,80	219	3h02
Mazowieckie (Warszawa)	11%	11%	11%	14%	0,79	556	8h05
Podlaskie (Bialystok)	1%	2%	1%	3%	0,68	699	10h20
Kujawsko-Pomorskie (Bydgoszcz)	3%	3%	3%	5%	0,59	268	3h58
Slaskie (Katowice)	11%	5%	9%	12%	0,43	696	8h21
Lubelskie (Lublin)	4%	2%	4%	6%	0,37	727	10h41
Swietokrzyskie Subcarpathian (Kielce)	4%	0%	3%	3%	0,00	646	9h00
Opolskie (Opole)	1%	0%	1%	3%	0,00	595	7h38
Podkarpathian (Rzeszow)	2%	0%	1%	5%	0,00	817	11h46
Total	100%	100%	100%	100%	1,00	419	6h24
Average distance to Kolobrzeg	428	392	419	38,1 mio.	Top 6	343	km
Number of responses, n	309	94	403		10 rest	599	km

Source: Based on departure survey undertaken at the Port of Nexø by CRT in 2006 + Polish population statistics, and distances and travel time by car according to viamichelin.com.

More than half (57%) of the Polish cyclists on Bornholm travel two and two. Another 19% of the Polish cyclists travel three together, i.e. over three fourth (76%) of the Polish cycle tourists on Bornholm travel together two or three.

Table 50 Size of the travel party for cyclists and other visitors from Poland via Nexø

Travel party size	Cyclist		Total
	No	Yes	
1	13%	10%	13%
2	39%	57%	42%
3	12%	19%	13%
4	5%	6%	6%
5	2%	1%	2%
6 or more	29%	7%	25%
Total	100%	100%	100%
Total, n	462	100	562

Source: Based on departure survey in Nexø, 2006.

90% of non-cyclists via Nexø were one day visitors, and just 10% overnight visitors, whereas as much as 100-18=82% of the cyclists stayed overnight.

Table 51 Single day visitors vs. overnight visitors from Poland (via Nexø) – cyclists vs. others

Nights on Bornholm	Cyclist		Total
	No	Yes	
0	90%	18%	75%
1 or more	10%	82%	25%
Total %	100%	100%	100%
Total, n	367	95	462
Total, split	79%	21%	100%

Source: Based on departure survey in Nexø, 2006.

The majority (82%-10%=72%) of those Polish cyclists (via Nexø) who stayed for at least one night on Bornholm stayed between two and five nights. 10% of overnight Polish cyclists stayed for just one night, whereas 100%-82%=18% of overnight cyclists stayed on Bornholm for between six and ten nights. None stayed for more than 10 nights. The average length of stay of Polish visitors who come via Nexø is (was) 3.3 for cyclists and 0.4 for non-cyclists, overall 1 night in average for visitors from Poland via Nexø. – All in all 25000 persons arrived from Poland via Nexø in 2008, and 5000 arrived from Poland to Bornholm via Rønne. Around 90% of those arriving to Bornholm from Poland are Polish visitors, whereas the rest are Danes returning, and Germans. There are no cycling Germans arriving from Poland to Bornholm via Nexø. Those few German visitors who come from Poland via Nexø are all one day visitors, and actually elderly Germans.

Table 52 Number of nights stayed on Bornholm by Polish cycle tourists and other Polish visitors (via Nexø)

Nights on Bornholm	Cyclist		Total
	No	Yes	
0	90%	18%	75%
1	3%	8%	4%
2	2%	13%	4%
3	1%	20%	5%
4	1%	13%	4%
5	1%	14%	3%
6	1%	4%	2%
7	1%	3%	1%
8	0%	2%	0%
9	0%	2%	0%
10	0%	3%	1%
14	1%	0%	0%
Total %	100%	100%	100%
Total, n	366	95	461
Total, split	79%	21%	100%
Average nights of stay, via Nexø	0,4	3,3	1,0

Source: Based on departure survey in Nexø, 2006.

Note: One Polish respondent who stay permanently on Bornholm is not included.

Among those overnight Polish cyclists, who mentioned one specific type of accommodation, that they had used, 70% had stayed at camping sites. This includes both primitive camping sites (tent sites, “tanie pola namiotowe”) and “normal” camping sites.

Table 53 Type of accommodation used by overnight Polish cycle tourists (via Nexø)

Type of accommodation	Cyclist		Total
	No	Yes	
Hotel	35%	11%	19%
Holiday centre	0%	3%	2%
Holiday cottage	23%	6%	11%
Camping	19%	70%	54%
Youth hostel	6%	6%	6%
At family/friends	16%	5%	8%
Total	100%	100%	100%
Total	31	66	97

Source: Based on departure survey in Nexø, 2006.

While 73% of non-cyclists were first-time visitors to Bornholm, this was the case for only 57% of the Polish cycle tourist on Bornholm. In other words, 43% of the Polish cycle tourist had been on Bornholm before the current visit, so they are generally more familiar with the island than non-cyclists.

Table 54 Number of visits to Bornholm by cyclists and other visitors from Poland (via Nexø)

No. Of visits to Bornholm	Cyclists		Total
	No	Yes	
1	73%	57%	69%
2	23%	34%	25%
3	3%	7%	4%
4	0%	2%	1%
5 or more	1%	0%	1%
Total, %	100%	100%	100%
Total, n	367	95	462
Total, split	79%	21%	100%

Source: Based on departure survey in Nexø, 2006.

Already in 2006, the Internet was the most important source of information for Polish visitors to Bornholm. All in all, 39% had used the Internet as a source of information about Bornholm, which was more than information from family and friends, which stood at 32% overall. However, if looking at the Polish cycling tourists, an astonishingly high percentage had used the Internet, namely 71%! Family and friends were in second place as a source of information among Polish cycling tourists, whereas this source of information was the most important one for non-cyclists. Guidebooks were in third place as a source of information among cyclists (23%). Guidebooks were twice as important as a source of information for cyclists than for non-cyclists.

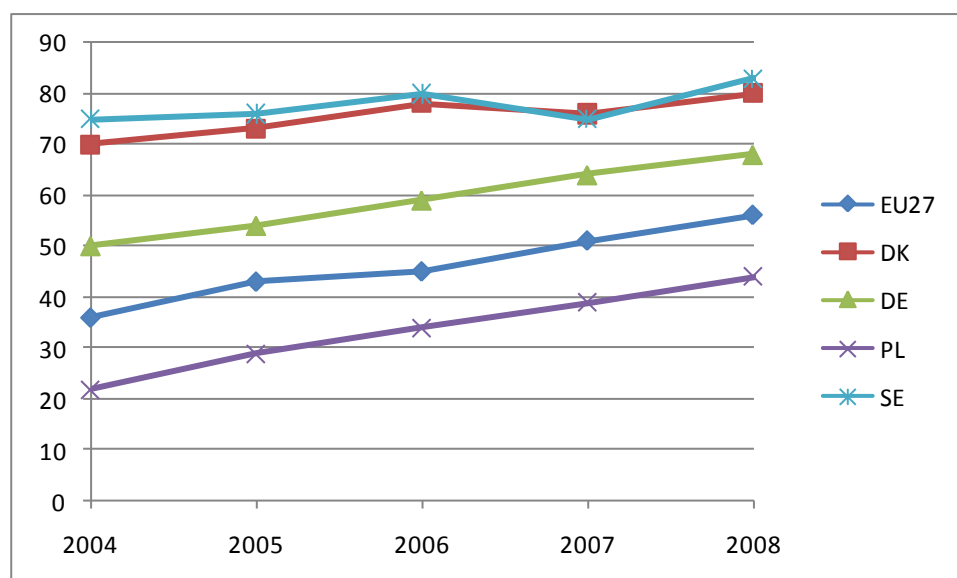
Table 55 Sources of information used by Polish cyclists and others before visiting Bornholm

Source of information	Cyclist		Total
	No	Yes	
Internet	31%	71%	39%
Family and friends	33%	28%	32%
Travel agent	22%	9%	20%
Ferry line	21%	9%	19%
Brochure	16%	15%	15%
Guide books	12%	23%	14%
Advertisements	6%	4%	5%
Total, n	367	95	462
Total, split	79%	21%	100%

Source: Based on departure survey in Nexø, 2006.

Internet usage in Poland has increased from 2006 to 2009, of course. Thus, Internet usage in Poland increased from 34 to 44 percent from 2006 to 2008, and may thus have reached about 49%, i.e. just under half. – Already in 2006, internet usage among the cycling tourist to Bornholm was twice as high as in the adult Polish population overall, or actually in the age group 15-74.

Table 56 Percentage of adult population in Poland, Denmark, Sweden, Germany and EU27, who had used the Internet at least once a week, in average, during the last three months, 2004-2008



Source: Eurostat.

So, what is the reason why Internet usage is much higher among Polish cycling tourists than other Polish visitors on Bornholm? One reason might be age, and another reason might be educational level.

The average age of Polish cycling tourist is (was) 33, while non-cyclists had an average age of 40½. – With respect to age groups, 75% of the Polish cyclists on Bornholm were in the age group 20-39 years, whereas only 39% on the non-cyclists were in that age group. - Those below 40 are the most frequent Internet users, in general.

Table 57 Age groups and average ages of cyclists and other Polish visitors to Bornholm

Age group	Cyclist		Total (%)
	No (%)	Yes (%)	
14-19	10%	1%	9%
20-29	18%	43%	23%
30-39	22%	32%	24%
40-49	20%	16%	19%
50-51	15%	6%	13%
60-69	10%	1%	8%
70-82	5%	0%	4%
Total, %	100%	100%	100%
Average age	40,6	33,0	39,0
Total, n	297	79	376

Source: Based on departure survey in Nexø, 2006.

There is a higher proportion with a higher education beyond high school (gymnasium), among cycling and non-cycling visitors to Bornholm from Poland. In other words, cyclists are generally better educated than non-cyclists. – This may contribute to explaining the very high Internet usage among Polish cycle tourist, along with the fact that 75% are in the age group 20-39, who are generally heavy Internet users.

Overall, there is (was) an equal proportion of men and women among Polish visitors to Bornholm. However, men were in the majority among cyclists, and slightly in minority among non-cyclists.

Table 58 Gender of cyclists and other Polish visitors to Bornholm (2006)

Gender	Cyclist		Total (%)
	No (%)	Yes (%)	
Male	48%	59%	50%
Female	52%	41%	50%
Total, %	100%	100%	100%
Total, n	347	90	437

Source: Based on departure survey in Nexø, 2006.

Although the cycling tourists have a higher educational level than non-cyclists, the income level is not higher than non-cyclists, actually a bit lower. This may be because there are a proportion of students or other young people who have not yet stated earning (any big salary) yet.

Table 59 Household income level for cyclists and non-cyclists from Poland to Bornholm (2006)

Income level	Cyclist		Total %
	No (%)	Yes (%)	
1) ~18300 PLN	46%	48%	47%
2) ~72000 PLN	33%	31%	32%
3) ~144000 PLN	17%	19%	17%
4) ~288000 PLN	4%	2%	4%
5) ~457000 PLN	0%	0%	0%
Subtotal	100%	100%	100%
Average income PLN	69579	62875	68208
Responses	249	64	313
Non responses	118	31	149
Total	367	95	462

Source: Based on departure survey in Nexø, 2006.

Note: The actual income brackets applied in the original questionnaire were: 1. Under 100.000 2. DKK. 100.000-199.999 DKK. 3. 200.000-399.999 DKK. 4. 400.000-799.999 DKK. 5. 800.000 or over. – The exchange rate was 1.92 DKK for 1 PLN in 2006. It was assumed that incomes were skewed towards the low end of each income bracket.

There is a remarkably high percentage of non-responses in the income question, since only two out of three respondents replied. It is likely that those who did not respond have a lower income than those who responded. This has not been taken into account above. – It is a well known fact that sensitive question tend to get a low percentage of replies among the respondents. And income is a sensitive question, especially if incomes are relatively low.

Between 8% and 10% of these hard core nomadic cycling holiday-makers on Bornholm are from Poland, although Polish visitors only account for 2% on all registered bednights on Bornholm in 2008 (including estimate for primitive camping and holiday cottages for Polish visitors). “Hard core” here just means that they cycle at least every second day, during the stay on Bornholm. Nomadic means that they stay at more than one place during their stay. This also means that stay should be at least two nights.

Table 60 Cycle tourists on Bornholm, and the share of “hard core” nomadic cyclists among Polish visitors

Cycle tourists and hard core nomadic cycling holiday-makers:	
600.000	visitors
25%	cycle, at least just a little bit
150.000	visitors, who cycle at least a little bit
	... but that includes everybody who have cycled just a tiny little bit.
	So, lets try again - and boil the cyclists down to those relevant here:
Cycle tourists and hard core nomadic cycling holiday-makers:	
600.000	visitors p.a.
300.000	overnight visitors in commercial accommodations
15%	are "heavy user" cyclists (5 on a scale from 1 to 5)
45.000	"heavy user" cycle tourists in commercial accommodations
23%	cycled between accommodations
10.350	"heavy user" cyclists, nomadic commercial cycling holiday-makers
Polish cycle tourists at primitive camping sites:	
53	tents per night
34	nights (mainly August)
2,25	persons per tent
4.000	Polish person nights at tent sites
80%	nomadic
3.200	person nights, nomadic
90%	cycle at least every second day
4	nights per stay
720	stays, hard core nomadic
Polish cycle tourist at normal camping sites:	
10.000	person nights
40%	nomadic
4.000	person nights, normadic
80%	cycle at least every second day, i.e. "hard core"
4	nights per stay
800	stays, hard core nomadic
400	stays, hard core nomadic at other types of accommodation, Polish
1.920	hard core nomadic cycling holiday-makers from Poland on Bornholm p.a.
19%	Polish of those who cycle at least every second day, and move between sites.

Note: “Hard core” = cycle at least every second day during stay. Nomadic: Stay at more than one place.

Primitive camping: The Polish expression for primitive camping is “tanie pola namiotowe”. There are 523 hits for this term plus Bornholm on the Internet, of which 378 are at Polish domains (.pl), of which 22 are shown in a normal Google search. This type of camping cannot be promoted through official channels, but those interested in this type of accommodation – on Bornholm - should not have much difficulty finding the necessary details on the Internet. – Anyway, two of the mentioned references are pdf-files – and here is one of them:

http://bornholm.modos.pl/download/bornholm_modos_pl_MapkaBornholmu.pdf

A Danish site has been quite influential with respect to primitive camping, namely

www.a7.dk/camping/ - which has been translated into Polish at presented at several Polish sites.

There are also 18 traditional camping sites on Bornholm:

Table 61 18 traditional camping-sites on Bornholm

Name	Street, village	Zip	District
Balka Strand Camping, FDM	Krogegårdsvej 2, Dueodde	3730	Nexø
Møllers Dueodde Camping	Duegårdsvej 2, Dueodde	3730	Nexø
Bornholms Familie Camping	Klynevej 6, Snogebæk	3730	Nexø
Nexø Familiecamping	Stenbrudsvej 26	3730	Nexø
Dueodde Vandrehjem og Camping	Skrokkegårdsvejen 17, Dueodde	3730	Nexø
Hullehavn Camping	Sydskovvej 9	3740	Svaneke
Svaneke Familie Camping	Møllebakken 8	3740	Svaneke
Rønne Nordskov Camping	Antoinettevej 2	3700	Rønne
Galløkken Camping	Strandvejen 4	3700	Rønne
Aakirkeby Camping	Haregade 23	3720	Aakirkeby
Sannes Familiecamping	Melstedvej 39	3760	Gudhjem
Sletten Camping	Melsted Langgade 45	3760	Gudhjem
Strandlunden Camping	Melstedvej 33	3760	Gudhjem
Bådsted Camping	Sønder Strandvej 91	3760	Gudhjem
Sandvig Familiecamping	Sandlinien 5 , Sandvig	3770	Allinge
Lyngholt Familie Camping	Borrelyngvej 43	3770	Allinge
Sandkaas Familiecamping	Poppelvej 2	3770	Allinge
Hasle Familiecamping	Fælledvej 30	3790	Hasle

Sources: Visitdenmark.com and official camping guide plus the home pages of camping sites.

Finally, among those Polish visitors, who come in via Rønne, popular places of residence in addition to camping are Hasle Hytteby in Hasle or Storlække Feriecenter in Allinge:

www.polferries.pl/bornholm/domki or at www.familieferiebornholm.dk .

4.4 Results from a survey among Polish cycle tourists leaving Bornholm (2009)

Below are the results of a survey among 100 Polish cycle tourists. Two thirds filled in a questionnaire before departing by ferry back to Poland from Nexø on Bornholm, with a bicycle, while one third responded in Koszalin, Poland.

36% of respondents said they had used or would use car, as one of the modes of transport to get to the place where the cycling on a cycle holiday begins, while 30% mentioned train. As many as 39% of respondents said they would cycle all the way from home on a cycle holiday. However, each respondent mentioned 1.39 modes of transport. A ranking among the modes of transport, with train first, followed by airplane, then bus, then car, then cycle, and finally ferry (only). If respondents used both car and train, then that was counted as “train” etc.

Table 62 Mode(s) of transport

Q18 Cycle entire trip	39%
Q18 By car	36%
Q18 By train	30%
Q18 By ferry	29%
Q18 By bus	3%
Q18 By airplane	2%
Modes/respondent (n=100)	1,39

Mode of transport	Percent
Cycle all the way	28,0
By car	27,0
By bus	2,0
By train	30,0
By airplane	1,0
By ferry	12,0
Total (n=100)	100,0

Table 63 Experience with Bornholm among 100 Polish respondents. – Port – Demographics – Travel party

Variable, question	Mean	Minimum	Maximum
Experience with Bornholm?	81%	0	1
Kolobrzeg	87%	0	1
km_to_ferry	295	2	866
Gender, male %	66%	0	1
Age	38	10	71
Any children	48%	0	1
No. of children	89%	0	4
Q2 Ages: 0-9	5%	0	1
Q2 Ages: 10-17	21%	0	1
Q2 Ages: 18 or over	30%	0	1
Q3 Mountain bike	62%	0	1
Q3_2 Car	63%	0	1
Q4_2 Alone	14%	0	1
Q4_2 With friends	63%	0	1
Q4_2 With family	54%	0	1
Q4_2 With biking org.	20%	0	1
Q4_2 With other org.	6%	0	1

Table 64 Cycling holiday experience – 100 Polish respondents

Variable, question	Mean
Cycling holiday	90%
Q5 In Poland	77%
Q5 In Germany	16%
Q5 In Denmark	64%
Q5 In Sweden	12%
Q5 Other countries	12%
Q5 Swe, DK, Pol, Other	2,33
Q5_1 W. Pomeranian 09	22%
Q5_1 On Bornholm 09	39%
Q5_1 In Scania 09	4%
Q5_2 W. Pomeranian, ever	55%
Q5_2 On Bornholm, ever	55%
Q5_2 In Scania, ever	11%
Q5_2 Of three regions	1,21
Q5_2 regions_ever	1,61

The most popular cycle train among the 100 Polish respondents was R10.

Table 65 Would like to cycle routes – Koszalin County

Variable, question	Mean
Q5_3 Maritime R-10	47%
Q5_3 Greenway	30%
Q5_3 Palaces	31%
Q5_3 Goths	21%
Q5_3 Sunny	18%
Q5_3 Mielno	17%
Q5_3 Sianow	20%
Q5_3 Flower	13%
Q5_3 Costal Kol.	36%
Q5_3 No. of Polish trails	2,33

Table 66 Would like to cycle routes – Bornholm – Scania

Q5_4 Nexø-Gudhjem	76%
Q5_4 Gudhjem-Allinge	49%
Q5_4 Allinge-Rønne	53%
Q5_4 Rønne-Nexø	58%
Q5_4 No. of Bornholm trails	2,36
Q5_7 Ystad-Fotevik	33%
Q5_7 Malmö-Falsterbo	27%
Q5_7 Helsingborg-Malmö	24%
Q5_7 Ystad-Ales Stenar	21%
Q5_7 No. of Scania trails	1,05
Q5 No. of trails of 17	5,74

The average length of cycling on a cycling holiday among 100 Polish respondents was 373 km. However, the median (middle) length was only about 300 km (280 or 300). Mean (and median) was 50 km per cycle day. The average duration of nights for a cycling holiday was 8 nights. However, the median (middle) duration was 7 nights. There was about one day without cycling for these cycle enthusiasts. $50 \times (7-1) = 300$ km. One or two of the 7 nights may have been spent in Poland, on the way out and/or when returning to Poland, for those cyclists who went to Bornholm.

Table 67 Length of stages etc.

Variable, question	Mean
Q11_1 Longest, km	86
Q11_2 Ideal, km	51
Q122 Poland	71%
Q122 Denmark	62%
Q122 Sweden	43%
Q122 Germany	37%
Q14 Degree nomadic	63%
Q15 No. of nights	8,0
Q16 Km average per day	50
Q17 Cycle percent of days	89%
Cycle_km_total	373
Q19 Own cycle	95%
Q20_X No. of cycling countries	2,0

Table 68 Technology questions

Variable, question	Mean
Q9 Mobile with GPS	30%
Q9 Mobile without GPS	56%
Q9 Seperate GPS	15%
Q9 Internet	76%
Q9 Technologies, of 4	1,77
Q9_X Routes online	77%
Q9 GPS routes before	34%
Q9 GPS routes during	4%
Q9 Any GPS downloads	38%
Q9 Any GPS device	41%
Q9 Internet info	90%
Q10 Would like GPS routes	72%
Q10_2 Download if costs	33%

Table 69 Q9 Any GPS device * Q10 Would like GPS routes

		Q10 Would like GPS routes		Total
		No	Yes	
Q9 Any GPS device	No	25	36	61
	Yes	3	39	42
Total		28	75	103

Table 70 Q10_2 Download if costs * Q10 Would like GPS routes

		Q10 Would like GPS routes		Total
		No	Yes	
Q10_2 Download if costs	No	25	33	58
	Yes, but only in home country	1	19	20
	Yes, even in foreign country	2	23	25
Total		28	75	103

Table 71 Comparison of characteristics of those who would like to use a GPS with cycle route on next cycling holiday

	t-test for Equality of Means			Would like	No thanks	Difference
	t	df	Sig. (2-tailed)			
Q9 Any GPS device	4,050	101	,000	52%	11%	41%
Q10_2 Download if costs	3,941	101	,000	43%	9%	34%
Q9 Mobile with GPS	3,796	101	,000	40%	4%	36%
Q9_2 Internet info	3,342	101	,001	96%	75%	21%
Q9 Technologies, of 4	3,082	101	,003	1,93	1,39	0,54
Q5_7 Ystad-Fotevik	3,042	101	,003	41%	11%	31%
Q18 By car	2,760	101	,007	43%	14%	28%
Q8_1 Nature, Koszalin	2,619	55	,011	4,41	3,77	,640
Q5_7 No. of Scania trails	2,580	101	,011	1,21	0,57	0,64
Q8_3 Beaches, Scania	2,409	43	,020	3,77	2,83	0,94
Q122 Sweden	2,364	101	,020	47%	30%	17%
Q9_1 GPS routes before	2,137	101	,035	40%	18%	22%
Q9_1 Any GPS downloads	2,127	101	,036	44%	21%	23%
Q5_3 Goths	2,061	101	,042	25%	7%	18%
Q3_2 Car	2,029	101	,045	68%	46%	22%

Those who would like to use a GPS with cycle route on next cycling holiday are different than those who would not in the following respects:

- They have a GPS-device: 52% of those who would like to use GPS cycling routing services have got a GPS-device.
- They tend not to be worried too much about the costs: More than half of those who would like to use GPS cycling routing services would download GPS routes even if there were download costs involved and they were in a foreign country. Those who don't want to use a GPS cycling routing service may be put off either because they think it may be costly, or they don't have a GPS device, or they have never tried to download GPS files.
- 40% of those who would like to use GPS cycling routing services have got a mobile phone with GPS.
- Almost all (96%) of those who would like to use GPS cycling routing services would seek information on the Internet before going on a cycling holiday.
- Those interested in GPS cycling routing services are more technology oriented than those who would not.
- Those who are interested in GPS cycling routing services are more positive about and more interested in Scania, Sweden than those who are not: 41% of those who would like to use GPS services might like to cycle the route Ystad-Fotevik, and other cycle routes in Scania. –
- Also, those who are interested in GPS cycling routing services tend to especially appreciate the nature around Koszalin, and some of the cycle routes around Koszalin such as the trail of the Goths.
- Those who are interested in GPS cycling routing services tend to have travelled to Kolobrzeg (or Ustka) by car (43%), and a relatively high proportion of those interested in GPS cycling services have got a car (68%).

The above is good news. However, there are some caveats also, i.e. some reasons not to be too optimistic about the uptake of GPS cycling routing services:

A rather large part of respondents – 41% - have got a GPS device, mostly mobile phones with GPS, but also some separate GPS-devices.

Table 72 Q9 Any GPS downloads * Q10 Would like GPS routes

		Q10 Would like GPS routes		Total
		No	Yes	
Q9 Any GPS downloads	No	22	42	64
	Yes	6	33	39
Total		28	75	103

Only 16 out of 100 Polish respondents are sure that they would like to visit Sweden a one or more countries on a cycle holiday. Of these 16, only 6 actually have a GPS-device. And only 3 of those 6 have actually tried to download GPS-routing files. – And only 1 out of the last 3 would be willing to pay to download the GPS-routing files when in Sweden. – So, as far as Sweden as a destination is concerned, it would be better to bet on the domestic cyclists for the GPS cycling routing services, and then Germans and Danes. Polish cyclists would of course be more than welcome in Scania, but they would be outnumbered by Swedes.

Table 73 Q9 Any GPS downloads * Q10 Would like GPS routes * Q9 Any GPS device * probability of taking a cycling holiday in Sweden next year

Q122 Sweden Q9 Any GPS device				Q10 Would like GPS routes		Total
				No	Yes	
,00	No	Q9 Any GPS downloads	No	9	7	16
			Yes	2	2	4
	Total		11	9	20	
Yes	Q9 Any GPS downloads	No	1	2	3	
		Yes	1	7	8	
	Total		2	9	11	
,50	No	Q9 Any GPS downloads	No	10	14	24
			Yes	2	3	5
	Total		12	17	29	
Yes	Q9 Any GPS downloads	No	0	8	8	
		Yes	1	15	16	
	Total		1	23	24	
1,00	No	Q9 Any GPS downloads	No	2	6	8
			Yes	0	2	2
	Total		2	8	10	
Yes	Q9 Any GPS downloads	No		3	3	
		Yes		3	3	
	Total			6	6	

Taking the point of view of West Pomerania as opposed to Sweden, there is of course a bigger chance of attracting Polish cycling tourists. Again, out of 100 Polish respondents, there are 51 who are sure that they want to make a cycle holiday in Poland next year. However, only 23 of them have a GPS device, but almost all of them, 22, would like to have cycle routes on their GPS device. Only 16 of the 22 have tried to download GPS files. – A couple of these 16 would not particularly like to try any of the cycle trails around Koszalin, which leaves 14 out of 100 Polish cycling tourists, who are sure that they will take a cycling holiday in Poland next year, and would like to try at least one of the cycle trails around Koszalin, and actually have a GPS-device, and have actually tried to download GPS-files. The last question is if they will pay to download the GPS-files. Well, if they can do so from home, from a website, it should not be a problem. – If there are cost involved, this would reduce the 16 to just 8. – But as mentioned, if the downloads can be done from a website, free of charge, 16 of 100 Polish cyclist tourists, who are already oriented towards the north of Poland and Bornholm, could become users of a GPS cycling routing service in West Pomerania including the area round Koszalin.

Table 74 Q9 Any GPS downloads * Q10 Would like GPS routes * Q9 Any GPS device * probability of taking a cycling holiday in Poland next year

Q122 Poland				Q10 Would like GPS routes		Total
Q9 Any GPS device				No	Yes	
,00	No	Q9 Any GPS downloads	No	2	2	4
		Total		2	2	4
	Yes	Q9 Any GPS downloads	No			1
Yes					4	4
Total				5	5	
,50	No	Q9 Any GPS downloads	No	9	11	20
			Yes	2	5	7
	Total			11	16	27
Yes	Q9 Any GPS downloads	No		1	6	7
		Yes		1	5	6
	Total			2	11	13
1,00	No	Q9 Any GPS downloads	No	10	14	24
			Yes	2	2	4
	Total			12	16	28
Yes	Q9 Any GPS downloads	No		0	6	6
		Yes		1	16	17
	Total			1	22	23

Finally, what about Bornholm. Well, the current visitors to the island seems to be quite happy with just their well tried maps. – Anyway, 14 out of 100 Polish cycling tourists, who are largely already

cycling tourist on Bornholm, would like to have cycle routes on their GPS, and have tried to download GPS-files already. – None of those who have a GPS-device, and who have tried to download GPS-files, and who are sure they will take a cycle holiday in Denmark (on Bornholm) next year reject the idea of cycle routes on GPS.

Table 75 Q9 Any GPS downloads * Q10 Would like GPS routes * Q9 Any GPS device * probability of taking a cycling holiday in Denmark – Bornholm - next year

Q122 Denmark Q9 Any GPS device				Q10 Would like GPS routes		Total
				No	Yes	
,00	No	Q9 Any GPS downloads	No	3	1	4
			Yes	0	1	1
	Total		3	2	5	
	Yes	Q9 Any GPS downloads	No		1	1
			Yes		3	3
	Total			4	4	
,50	No	Q9 Any GPS downloads	No	8	14	22
			Yes	1	3	4
	Total		9	17	26	
	Yes	Q9 Any GPS downloads	No	1	7	8
			Yes	1	10	11
	Total		2	17	19	
1,00	No	Q9 Any GPS downloads	No	7	8	15
			Yes	2	2	4
	Total		9	10	19	
	Yes	Q9 Any GPS downloads	No		4	4
			Yes		10	10
	Total			14	14	

So, out of 100 Polish cyclists, there are some who have a GPS-device, and who have tried to download GPS-files, and who are sure about where they will cycle next year, and would like to use a GPS cycling routing service :

- 3 who would cycle in Scania, Sweden
- 10 would cycle on Bornholm, Denmark
- 16 would cycle in West Pomerania and try some of the trails around Koszalin.

Distance to ferry port:

Table 76 Routes to Bornholm – for those who were departing from Nexø (summer 2009)

Routes to Bornholm	Went from Kolobrzeg	Went from Utska/Dar.	Total
Kolobrzeg-Nexø	80%	25%	70%
Ustka/Darlowo-Nexø	5%	58%	15%
Swinjocie-Rønne	11%	17%	12%
Sassnitz-Rønne	2%	0%	1%
Fly to Bornholm	2%	0%	1%
Total	100%	100%	100%
Total	55	12	67

Table 77 100 Polish respondents by overnight destinations visited – for those who were interviewed on Bornholm vs. those who were interviewed in Poland (summer 2009)

Stayed in Pomerania?	Interviewed on Bornholm?		
	Yes	No	Total
No	41	4	45
Yes	27	28	55
Total	68	32	100

Stayed on Bornholm?	Interviewed on Bornholm?		
	Yes	No	Total
No	26	19	45
Yes	42	13	55
Total	68	32	100

Stayed in Scania?	Interviewed on Bornholm?		
	Yes	No	Total
No	63	26	89
Yes	5	6	11
Total	68	32	100

55% of the Polish respondents had actually had a cycling holiday with at least one night of stay in West Pomerania. Those who were not interviewed on Bornholm were interviewed online or in person in Koszalin. The vast majority of these had had a cycling holiday with at least one night. Apart from the 68 of 100 Polish respondents who were interviewed on Bornholm, 32 were interviewed in Poland. 13 of the 32 Polish respondents who responded in person or online in

Poland had previously had a cycling holiday on Bornholm, bringing the total of Polish respondents who have experience with Bornholm to 81 of 100, i.e. 81%.

Table 78 Experience with Bornholm among 100 Polish respondents, summer 2009

Experience with Bornholm?	Interviewed on Bornholm?		
	Yes	No	Total
No	0	19	19
Yes	68	13	81
Total	68	32	100

Table 79 Relative knowledge about five destinations, and their suitability for a cycling holiday

Destination	N	Mean
Q6 Bornholm, Denmark	86	4,76
Q6 Kolobrzeg Powiat	63	3,56
Q6 Koszalin Powiat	56	3,27
Q6 Rügen, Germany	33	3,88
Q6 Scania, Sweden	27	4,07
Respondents, n	100	3,91

Note: Based on 100 Polish respondents, two thirds of which were interviewed on departure from Bornholm, summer 2009.

Table 80 Importance of 8 attributes for cycling tourists, and assessed importance of three destinations: Koszalin county, Bornholm and Scania

	Attribute	Importance - general	Performance Koszalin P.	Performance Bornholm	Performance Scania
1	Cycle trails	4,71	3,28	4,68	3,74
2	Nature	4,63	4,26	4,60	3,93
3	Atmosphere	4,44	3,61	4,30	3,66
4	Historical build	3,82	3,46	4,17	3,62
5	Short transport	3,81	3,48	3,92	3,64
6	Beaches	3,77	3,76	4,12	3,58
7	Entertainment	3,04	3,37	3,55	3,36
8	Museums	2,99	3,28	3,95	3,60
	Importance*performance		111,9	131,4	114,3
	Average	3,90	3,59	4,21	3,66

Note: Based on 100 Polish respondents, summer 2009.

The average importance of the eight attributes of destinations for cycling tourists was 3.90 on a scale from 1 to 5, with 5 as the highest and 1 as the lowest. For cycling holiday-makers cycle trails was the most important thing followed by nature and atmosphere. Koszalin county got an overall weighted average performance score of 3.59 on a scale from 1 to 5. The best attributes of Koszalin county is nature, the beach and the atmosphere. The cycle trails did not score well, which is not so good, since cycle trails are considered to be of utmost importance by the cycling tourists. Bornholm got the highest weighted average performance score of the three destinations. The cycle trails on Bornholm were generally found to be excellent. Also Bornholm scored very high on nature and atmosphere of the ports/towns/villages. – Among those 27% of the respondents who were able and willing to evaluate Scania in Southern Sweden as a cycle holiday destination, nature, cycle trails and atmosphere scored highest among the eight attributes.

Table 81 Guidelines in an importance and performance analysis

	Great performance	Modest performance
High importance	Continue the good work	Improve here
Low importance	Possible overkill	Low priority

For Koszalin the guideline would say the following: The cycle trails should be improved, since the performance here is relatively modest while the importance is high. The beautiful nature of Koszalin county should be stressed, since nature is considered by cycling tourists to be one of the most important attributes of a destination.

For Bornholm the advice would be to continue the good work, since Bornholm already scores very well on the most important attributes. The fact that Bornholm has good cycle trails, and beautiful nature and picturesque ports etc. should be stressed in marked communication to cyclists.

For Scania the knowledge level about Sweden in general and Scania specifically as a cycle destination should be increased, certainly in Poland if Scania will attempt to attract Polish cycling holiday-makers. The beautiful nature and the location of the cycle tracks should be stressed, as well as where to experience the local atmosphere.

Table 82 On a cycling holiday, in which countries would you consider travelling?

	Frequency	Percent
Poland and Bornholm	51	51,0
Poland and Scania	3	3,0
Bornholm and Scania	7	7,0
Poland and Bornholm and Scania	15	15,0
Poland only	5	5,0
Bornholm only	4	4,0
Scania only	1	1,0
None of the above	14	14,0
Total	100	100,0
In which countries?		
Poland, in any combination	74	74,0
Bornholm, in any combination	77	77,0
Scania, in any combination	26	26,0

Note: Based on 100 Polish respondents, summer 2009.

Table 83 Would you cycle in none, one, two or three countries?

	Frequency	Percent
None	10	10,0
One	22	22,0
Two	24	24,0
Three	44	44,0
Total	100	100,0

Note: Based on 100 Polish respondents, summer 2009.

Table 84 Which cycling countries by no. of cycling countries

Which cycling countries?	No. of cycling countries				Total
	0	1	2	3	
Poland and Bornholm	1	12	15	23	51
Poland and Scania	1	0	1	1	3
Bornholm and Scania	2	1	2	2	7
Poland and Bornholm and Scania	1	1	4	9	15
Poland only	2	2	1	0	5
Bornholm only	0	0	1	3	4
Scania only	0	0	0	1	1
None of the above	3	6	0	5	14
Total	10	22	24	44	100
No. of cycling countries					
Which cycling countries?	0	1	2	3	Total
Poland, in any combination	5	15	21	33	74
Bornholm, in any combination	4	14	22	37	77
Scania, in any combination	4	2	7	13	26

Table 85 Which cycling countries by no. of cycling countries – among those who actually have a GPS device

Any GPS device?		No. of cycling countries				
	Which cycling countries	0	1	2	3	Total
No	Poland and Bornholm	1	9	11	12	33
	Poland and Scania	0	0	0	1	1
	Bornholm and Scania	2	1	2	1	6
	Poland and Bornholm and Scania	1	0	0	4	5
	Poland only	0	2	1	0	3
	Bornholm only	0	0	0	2	2
	Scania only	0	0	0	1	1
	None of the above	2	4	0	2	8
	No GPS device	6	16	14	23	59
Yes	Poland and Bornholm	0	3	4	11	18
	Poland and Scania	1	0	1	0	2
	Bornholm and Scania	0	0	0	1	1
	Poland and Bornholm and Scania	0	1	4	5	10
	Poland only	2	0	0	0	2
	Bornholm only	0	0	1	1	2
	None of the above	1	2	0	3	6
	Yes, have GPS device	4	6	10	21	41
	Which cycling countries -	No. of cycling countries				
	Among those with GPS device:	0	1	2	3	Total
	Poland, in any combination	3	4	9	16	32
	Bornholm, in any combination	0	4	9	18	31
	Scania, in any combination	2	3	5	9	19

Table 86 Which cycling countries by no. of cycling countries – among those who actually have a GPS device AND who have tried to download GPS-files

Any GPS device?		No. of cycling countries				
	Which cycling countries	0	1	2	3	Total
No	Poland and Bornholm	0	0	4	2	6
	Bornholm and Scania	1	0	1	0	2
	Poland and Bornholm and Scania	0	0	0	1	1
	Poland only	0	1	0	0	1
	Bornholm only	0	0	0	1	1
	No GPS device	1	1	5	4	11
	Yes					
Yes	Poland and Bornholm	0	1	1	9	11
	Poland and Scania	0	0	1	0	1
	Bornholm and Scania	0	0	0	1	1
	Poland and Bornholm and Scania	0	1	3	3	7
	Poland only	1	0	0	0	1
	Bornholm only	0	0	1	1	2
	None of the above	1	1	0	2	4
Yes, have GPS device	2	3	6	16	27	
Among those with GPS device - who have tried to download GPS-files:						
	Which cycling countries?	No. of cycling countries				
		0	1	2	3	Total
	Poland, in any combination	1	2	5	12	20
	Bornholm, in any combination	0	2	5	14	21
	Scania, in any combination	1	2	4	6	13

Overall, 59% of respondents would stay at camping sites on a cycling holiday. Among those who were interviewed on Bornholm, a higher percentage, 69%, had stayed at or would stay at camping sites (including primitive camping sites). 25% of those who were not actually on Bornholm, when they responded, would stay at guest houses or at friends and relatives'.

Table 87 Type of accommodation preferred by Polish holiday cyclists.

Type of accommodation	Inter. on Bornholm	Not on Bornholm	All Polish
Camping	69%	38%	59%
Hotel	6%	9%	7%
Holiday centre	4%	3%	4%
Youth hostel	4%	9%	6%
Holiday cottage	13%	16%	14%
B&B / Farm house	1%	16%	6%
At friends', relatives'	0%	9%	3%
Other	1%	0%	1%
Total, %	100%	100%	100%
Total, n	68	32	100

Overall, those Polish respondents who were quizzed on departure from Bornholm in the summer of 2009 travelled an average of 406 km from their home to get to the ferry port in Poland. Among the majority (82%) travelled from Kolobrzeg to Bornholm, while 18% of the respondents who were interviewed on Bornholm had travelled from Ustka. Those who had travelled from Kolobrzeg had travelled considerably longer (namely 442 km) than those who had travelled from Ustka (244 km). An additional group of respondents were from Koszalin, which is 45 km from Kolobrzeg.

Table 88 Travel distances in Poland to get to ferry ports in Kolobrzeg and Ustka among Polish cycling visitors to Bornholm 2009

km_to_ferry	km from/to Kolobrzeg		km from/to Ustka		Total, km on Bornholm		Total, on Bornholm	Other Polish, all from Koszalin		All Polish, living in Poland	
	Mean	N	Mean	N	Mean	N	N, %	Mean	N	Mean	N
Voivodeship											
West Pomeranian (Szczecin)	134	8	263	1	148	9	13%	45	31	68	40
Pomeranian (Gdansk)	250	7	124	8	183	15	22%			183	15
Warmian-Masurian (Olsztyn)	306	2			306	2	3%			306	2
Greater Poland (Poznan)	310	4			310	4	6%			310	4
Kuyavian-Pomeranian (Bydgoszcz)	268	1			268	1	1%			268	1
Lesser Poland (Krakow)	767	2			767	2	3%			767	2
Lódz (Lodz)	506	10			506	10	15%			506	10
Lower Silesian (Wroclaw)	460	1			460	1	1%			460	1
Lublin (Lublin)	716	2			716	2	3%			716	2
Lubusz (Gorzow Wlkp)	270	1			270	1	1%			270	1
Masovian (Warsaw)	561	9	499	2	550	11	16%			550	11
Silesian (Katowice)	690	7	672	1	688	8	12%			688	8
Holy Cross (Kielce)	732	1			732	1	1%			732	1
Total	442	55	244	12	406	67	100%	45	31	292	98

Note: "Total, km on Bornholm" in column 3 is the average of those who travelled to Kolobrzeg and those who travelled to Ustka, to catch the ferry to Bornholm. Thus it is the number of km travelled in Poland (one way), to get to the ferry, not the distance cycled on Bornholm.

Based on a simple average of the split of Polish cyclists on Bornholm in 2006 and in 2009, by voivodship in Poland, compared to the split of the population in Poland by voivodship, Bornholm has a relatively great appeal to the citizens of West Pomeranian (Szczecin), Pomerania (Gdansk), Lódz, Greater Poland (Poznan) and Masovian (Warsaw). In both surveys (2006 and 2009), there are relatively few holiday cyclists from Kuyavian-Pomeranian (Bydgoszcz). This is a little surprising, since there is only 268 km from Bydgoszcz to Kolobrzeg. The unemployment rate is relatively high in Kuyavian-Pomeranian (Bydgoszcz), though, which may be one of the explanations. – From Gdansk and Olsztyn it is relatively popular to sail from Ustka to Bornholm, which is somewhat closer from these cities than Kolobrzeg. On the other hand there is no direct trains to Ustka, so a change of train in Slupsk is necessary. The ferry from Ustka sailed on Wednesdays and Saturdays in 2009 to Bornholm. The same ship, Lady Assa, sailed on Tuesdays

from Darlowo to Bornholm (Nexø). – However, the ship Jantar sails to Bornholm from Kolobrzeg every day in the high season and several days a week during the rest of the sailing season.

Table 89 Holiday cyclists and population in Poland: Market segments and tentative priority by voivodeship

	Voivodeship	Main city	Main city to Kolobrzeg	2009 survey km, average	Cyclists 2009, N	Cyclists 2006_ %	Cyclists 2009_ %	Average cycle %	2006, % Population	Cycle index
A	West Pomeranian	Szczecin	144	148	9	22%	13%	18%	4,4%	4,03
A	Pomeranian	Gdansk	247	183	15	7%	22%	15%	5,8%	2,58
A	Lódz	Lodz	504	506	10	7%	15%	11%	6,7%	1,66
A	Greater Poland	Poznan	287	310	4	16%	6%	11%	8,8%	1,24
A	Masovian	Warszawa	556	550	11	11%	16%	14%	13,5%	1,00
B	Warmian-Masurian	Olsztyn	413	306	2	4%	3%	4%	3,7%	0,97
B	Lower Silesian	Wroclaw	460	460	1	10%	1%	6%	7,6%	0,73
B	Silesian	Katowice	696	688	8	5%	12%	9%	12,3%	0,70
B	Lubusz	Gorzow Wlkp	219	270	1	2%	1%	2%	2,6%	0,68
C	Lesser Poland	Krakow	767	767	2	7%	3%	5%	8,6%	0,61
C	Lublin	Lublin	727	716	2	2%	3%	3%	5,7%	0,45
C	Kuyavian-Pomeranian	Bydgoszcz	268	268	1	3%	1%	2%	5,4%	0,43
C	Podlaskie	Bialystok	699	699	0	2%	0%	1%	3,1%	0,34
C	Holy Cross - Kielce	Kielce	646	732	1	0%	1%	1%	3,4%	0,22
C	Opole	Opole	595	595	0	0%	0%	0%	2,7%	-
C	Subcarpathian	Rzeszow	817	817	0	0%	0%	0%	5,5%	-
	Total		419	406	67	100%	100%	100%	100%	1,00

5 Sweden

5.1 General ferry and bednight statistics of Sweden, hereunder Scania

Table 90 Swedish ferry statistics, 2008

Port	Routes fo / from	International% 2008	2008 International	2008 Domestic	Total 2008	Total 2008, %
Helsingborg	Denmark	100%	10.911.452	0	10.911.452	34,3%
Stockholm	Finland, Est., Lat.	100%	8.639.423	0	8.639.423	27,2%
Ystad	Bornholm/Poland	100%	1.856.865	0	1.856.865	5,8%
Göteborg	Denmark	100%	1.843.236	0	1.843.236	5,8%
Trelleborg	Germany	100%	1.820.810	0	1.820.810	5,7%
Gotland's ports	Domestic	0%	0	1.583.085	1.583.085	5,0%
Strömstad	Norway	100%	1.488.576	0	1.488.576	4,7%
Nynäshamn	Domestic/Poland,	15%	210.492	1.155.717	1.366.209	4,3%
Kapellskär	Finland, Estonia	100%	953.924	0	953.924	3,0%
Oskarshamn	Domestic	0%	-	398.532	398.532	1,3%
Karlskrona	Poland, Gdynia	100%	375.265	0	375.265	1,2%
Malmö	Denmark	100%	207.278	0	207.278	0,7%
Varberg	Denmark	100%	172.130	0	172.130	0,5%
Karlshamn	Lithuania	100%	108.814	0	108.814	0,3%
Umeå	Finland	100%	68.315	0	68.315	0,2%
Total		90%	28.656.580	3.137.334	31.793.914	100%

Source: Transportgruppen.se.

Figure 25 Ferry-passengers in Swedish ports, international and domestic, 2008

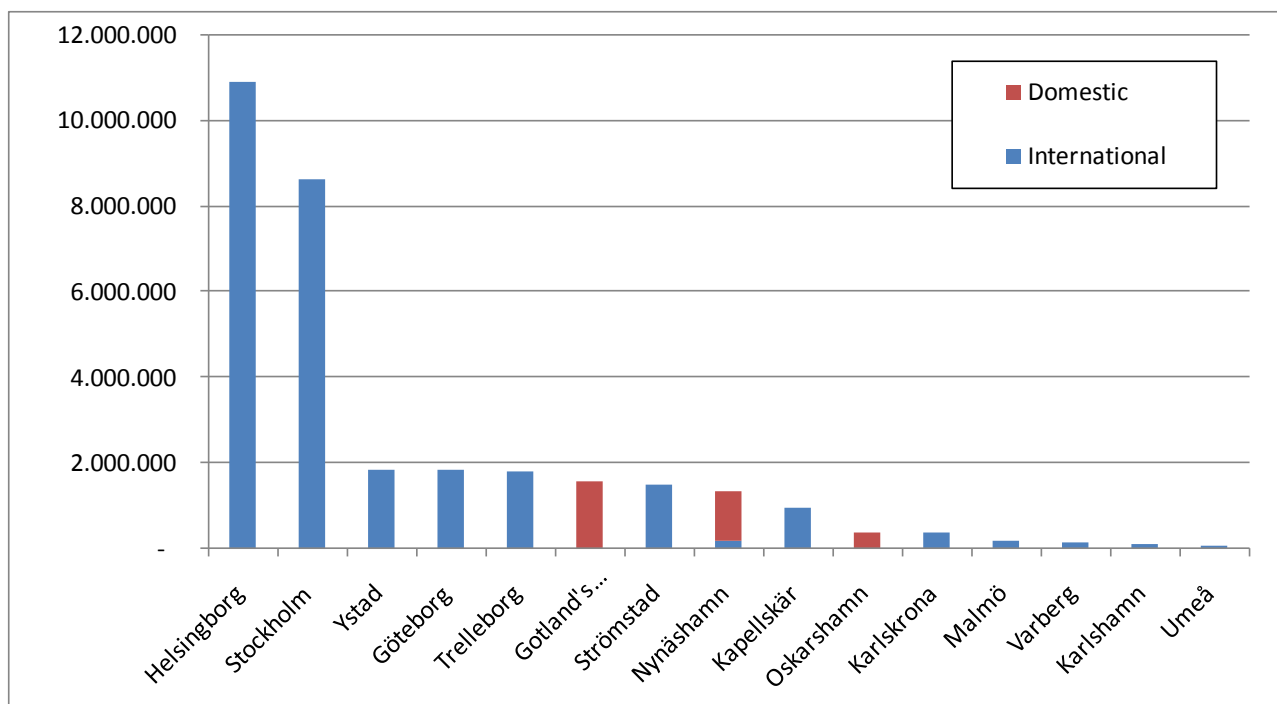


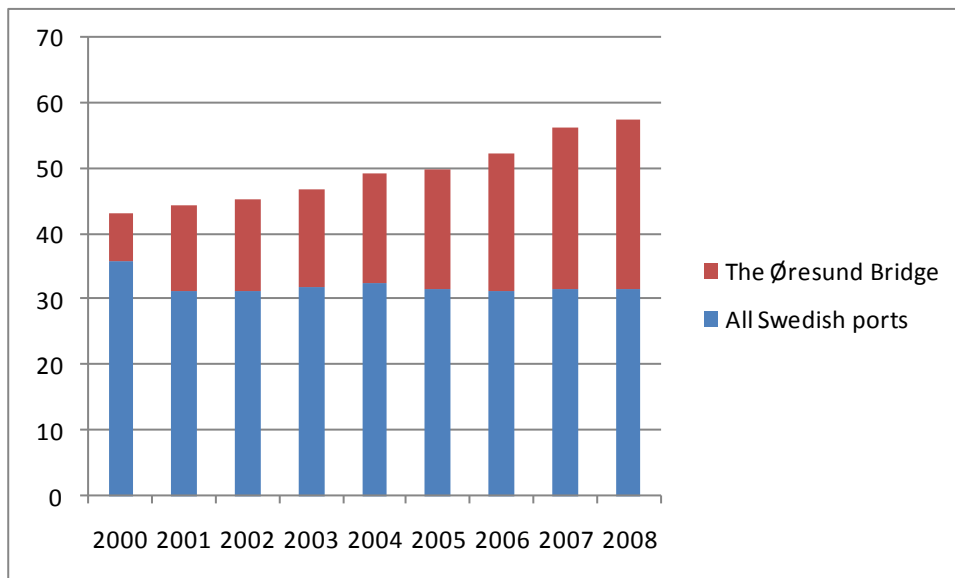
Table 91 Ferry-passengers in Swedish ports, 2000-2008 – and the Øresund Bridge

Port	2000	2001	2002	2003	2004	2005	2006	2007	2008
Helsingborg	13.524.614	11.770.673	11.666.203	11.692.843	11.808.160	11.102.138	10.775.694	10.966.204	10.911.452
Stockholm	7.745.597	7.000.786	6.826.214	7.293.839	7.813.346	8.187.001	8.032.226	8.112.207	8.639.423
Ystad	1.136.310	1.284.528	1.435.522	1.472.134	1.612.178	1.815.014	1.936.622	1.878.243	1.856.865
Göteborg	2.936.500	2.657.898	2.746.753	2.750.462	2.606.336	2.264.376	2.187.878	2.091.259	1.843.236
Trelleborg	2.085.823	1.852.968	1.855.312	2.100.037	1.940.503	1.690.758	1.696.646	1.816.301	1.820.810
Gotland's ports	1.290.682	1.293.951	1.377.039	1.422.450	1.456.413	1.460.292	1.472.260	1.564.651	1.583.085
Strömstad	1.266.278	1.218.226	1.270.650	1.282.442	1.285.618	1.210.171	1.250.160	1.344.829	1.488.576
Nynäshamn	1.067.973	1.125.680	1.136.080	1.150.524	1.244.763	1.267.888	1.273.102	1.343.008	1.366.209
Kapellskär	639.700	1.280.913	1.514.002	1.440.330	1.405.574	1.430.904	1.381.798	1.184.469	953.924
Oskarshamn	354.495	358.868	393.304	386.167	383.260	388.635	388.614	391.917	398.532
Karlskrona	267.172	299.216	389.355	384.239	419.776	361.235	413.463	431.606	375.265
Malmö	2.764.503	926.348	257.352	120.551	146.111	153.140	155.462	174.427	207.278
Varberg	274.973	223.525	188.872	194.803	122.083	170.418	170.332	168.206	172.130
Karlshamn	n.a.	n.a.	45.076	59.887	69.315	106.601	110.815	118.194	108.814
Umeå	299.730	83.399	105.332	108.543	108.831	88.590	76.993	70.524	68.315
Other	147.007	81.287	33.871	0	0	178	0	0	0
Total, ferry ports	35.801.357	31.458.266	31.240.937	31.859.251	32.422.267	31.697.339	31.322.065	31.656.045	31.793.914
Øresund bridge	7.430.000	12.910.000	14.220.000	15.160.000	16.850.000	18.300.000	20.940.000	24.500.000	25.700.000
Ferries+bridge	43.231.357	44.368.266	45.460.937	47.019.251	49.272.267	49.997.339	52.262.065	56.156.045	57.493.914

Source: Based on statistics from Transportgruppen.se – plus annual reports of the Øresund Bridge Consortium.

Note: The ~3 million domestic passengers are double counted. – Thus about 1.5 million should be subtracted.

Figure 26 Ferry passengers in all Swedish ports plus passengers passing the Øresund Bridge, 2000-2008



Sources: As previous table.

Table 92 Passenger traffic across Øresund 1999 – 2008 (million passengers)

	1999	2001	2003	2005	2007	2008
Øresund Bridge by car	-	8,0	9,5	11,7	14,8	15,0
Øresund Bridge by train	-	4,9	5,7	6,6	9,7	10,7
Hydrofoils, Copenhagen – Scania	3,6	1,1	-	-	-	-
Dragør – Limhamn	1,6	-	-	-	-	-
Elsinore – Helsingborg	14,3	11,5	11,6	11,0	11,0	10,9
Øresund in total	19,5	25,5	26,8	29,3	35,5	36,7
Øresund Bridge, share	0%	51%	57%	62%	69%	70%

Source: <http://uk.oresundsbron.com>, Annual Report 2008

It is allowed to bring bicycles along on most trains passing the Øresund Bridge.

Scania (Skåne), Southern Sweden, account for 1,5 million – or 9% - out of 17 million personnights at camping sites in Sweden in 2007.

Table 93 Bednights at campingsite by Län in Sweden, 2007

Län:	Kod	Volym- andel %	Gästnätter 2007
Stockholm	1	5,99	1 019 238
Uppsala	3	2,60	442 135
Södermanland	4	2,44	415 585
Östergötland	5	3,20	544 351
Jönköping	6	2,56	434 689
Kronoberg	7	2,00	339 507
Kalmar 1)	8	10,18	1 731 813
Gotland	9	1,48	251 679
Blekinge	10	2,53	431 033
Skåne	12	8,91	1 515 649
Halland	13	7,90	1 343 282
Västra Götaland 2)	14	18,63	3 168 890
Värmland	17	5,24	891 440
Örebro	18	2,09	355 356
Västmanland	19	1,39	235 841
Dalarna	20	6,40	1 089 221
Gävleborg	21	2,57	437 772
Västernorrland	22	1,95	331 792
Jämtland	23	3,47	590 935
Västerbotten	24	3,99	679 172
Norrbotten	25	4,48	762 340
Hela riket		100,00	17 011 720

Source: Sveriges Camping- & Stugföretagares Riksorganisation,
http://www.scr.se/Documents/Branschfakta/SCR_Gnattstat_2007.pdf

The camping-bednights were split as follows, by nationalities. Sweden, the domestic market accounted for 84% of the total in 2007. Germany accounted for 8%, Denmark 3%, Poland 0.5%.

Table 94 Bednights at camping sites, other accommodations, and in total, in Scania and all of Sweden, by nationality, 2007

	Swedes	Norway	Denmark	Finland	Germany	UK	NL	France	Poland	Other	Total
Camping, 2007											
All of Sweden	76,5%	10,3%	1,7%	0,4%	6,5%	0,2%	2,4%	0,3%	0,2%	1,5%	100,0%
Scania	84,2%	0,8%	2,7%	0,2%	7,9%	0,1%	2,5%	0,2%	0,5%	0,9%	100,0%
Sweden, *1000	13.014	1.752	289	68	1.106	34	408	51	34	3	17.012
Scania, *1000	1.276	12	41	3	120	2	38	3	8	0	1.516
Hotels, holiday villages, youth hostels, 2007											
All of Sweden	77,2%	3,4%	2,1%	1,1%	3,2%	1,9%	0,9%	0,7%	0,5%	9,1%	100,0%
Scania	78,7%	1,2%	3,0%	0,6%	4,2%	1,9%	0,8%	0,5%	0,4%	8,8%	100,0%
Sweden, *1000	24.391	1.065	665	351	1.002	602	290	208	142	2.877	31.593
Scania, *1000	2.470	37	94	18	132	58	24	16	13	277	3.139
Total, 2007											
All of Sweden	77,0%	5,8%	2,0%	0,9%	4,3%	1,3%	1,4%	0,5%	0,4%	6,4%	100,0%
Scania	80,5%	1,1%	2,9%	0,5%	5,4%	1,3%	1,3%	0,4%	0,4%	6,2%	100,0%
Sweden, *1000	37.405	2.817	954	419	2.108	636	699	259	176	3.133	48.605
Scania, *1000	3.746	49	135	21	251	60	62	19	20	290	4.655

Source: Sveriges Camping- & Stugföretagares Riksorganisation, SCR.se (camping), and Accommodation statistics 2007, Sweden (total), Nutek and SCB. – The difference between the two represents other accommodations (the middle section), which is calculated as the difference between the bottom section and the top section.

Tent plays only a small role as a type of accommodation at camping sites in Scania and in Sweden overall. However, this may partly be because tents are sometimes just put up in nature instead of at camping sites in Sweden.

Table 95 Split of bednights by type of camping accommodation, Scania and all of Sweden, percent, 2007

Type	Scania	Sweden
Caravan	73,2	78,0
Tent	7,7	8,8
Mobile home	7,1	6,6
Cottage	12,0	6,6
Total, percent	100,0	100,0

Source: Sveriges Camping- & Stugföretagares Riksorganisation, SCR.se.

Table 96 Bednights at hotels, holiday villages and youth hostels, plus an estimated total 2008, in Scania and all of Sweden, by nationality, assuming unchanged camping nights

Hotels, holiday villages, youth hostels, 2008	Swedes	Norway	Denmark	Finland	Germany	UK	NL	France	Poland	Other	Total
All of Sweden	77,1%	3,5%	2,4%	1,2%	3,2%	1,9%	1,0%	0,7%	0,4%	8,5%	100,0%
Scania	78,7%	1,3%	3,5%	0,6%	4,2%	1,7%	0,9%	0,5%	0,8%	7,7%	100,0%
Sweden, *1000	24.813	1.131	781	371	1.044	614	330	239	140	2.739	32.202
Scania, *1000	2.475	41	109	20	133	54	29	17	24	244	3.146
Total, 2008, estimate	Swedes	Norway	Denmark	Finland	Germany	UK	NL	France	Poland	Other	Total
All of Sweden	77,3%	5,9%	2,2%	0,9%	4,4%	1,3%	1,5%	0,6%	0,4%	5,6%	100,0%
Scania	80,7%	1,1%	3,2%	0,5%	5,4%	1,2%	1,4%	0,4%	0,7%	5,2%	100,0%
Sweden, *1000	37.827	2.883	1.070	439	2.150	648	738	290	174	2.741	48.961
Scania, *1000	3.751	53	150	23	253	55	67	20	31	244	4.648

Source: Accommodation statistics 2008, Sweden (total), Nutek and SCB.

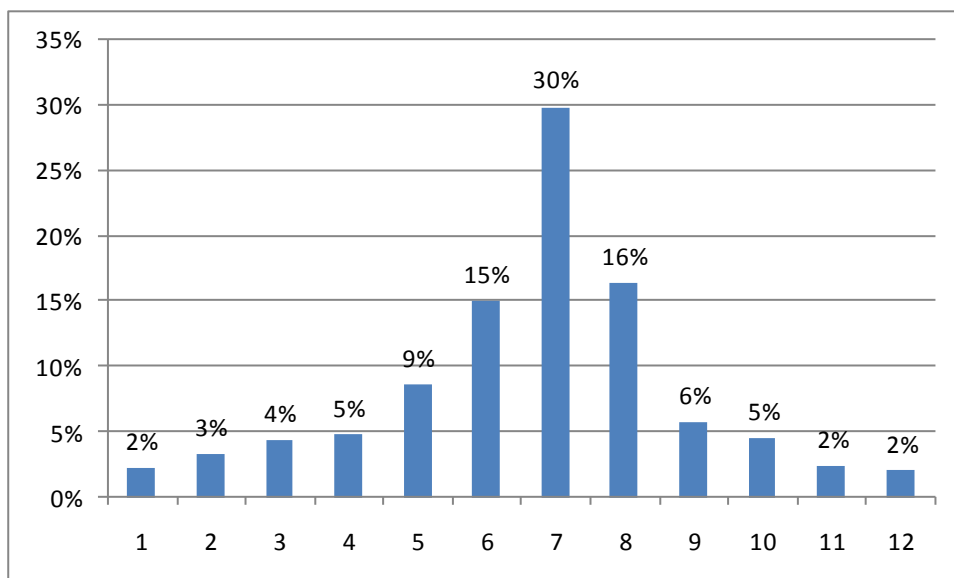
Note: The total is estimated, assuming the same number of camping-nights in 2008 as in 2007.

In Scania 84% of person-nights at camping sites are domestic, and 79% of bednights at hotels, holiday villages and youth hostels in Scania are domestic. Overall 81% of bednights in Scania (and 77% in all of Sweden) are domestic. Therefore the domestic market is bound to be important for almost any new activity in the tourism sector.

The camping-season probably reflects the cycling season in Scania, Sweden. As an indicator of the camping-season is chosen the split of caravans transported on the ferry routes between

Helsingør in Denmark and Helsingborg in Scania, Sweden. The three months June to August account for 61% of the full year's camping activity. July alone accounts for 30%. Cycling as a holiday activity is probably even more concentrated in the summer months in Scania, Sweden, since caravans may also be used during the winter time by skiers and others.

Figure 27 Caravans by month of year on the route(s) Helsingør-Helsingborg, 2008



Source: Statistics Denmark, Statistikbanken.dk.

The season at other types of accommodation than camping is less concentrated in the summer months than camping.

With respect to cycle holidays in Sweden it is worth mentioning the “right of access for everyone”, in Swedish called “Allemansrätten”:

“Allemansrätten” is an unwritten law that includes, amongst other things:

- You may put up a small tent for the odd night on someone's land, a reasonable distance from the dwelling.
- You may light a campfire with twigs and branches lying on the ground. Remember the danger of the fire spreading, and don't light a fire on rocks, as they can crack.
- You may roam freely in forests and across the land, and cycle on existing roads and tracks, providing you don't damage any vegetation.

- All motorised traffic is forbidden in the forest and countryside. You may also not park a caravan anywhere you like.
- * You may not pick or damage protected plants. Most other plants also look best right where they are. Avoid as far as possible disturbing birds during the mating season.
- Stronger rules apply inside protected areas for birds and nature reserves.

Source: www.svenska-cykelsallskapet.se/images/allemansratt-eng.pdf

For monadic cycling tourists – with a tent – in Scania, it may be worth mentioning, that it is allowed to camp on the beach for up to 24 hours, cf. Allemansrätten.⁴ There is a road along the coast all the way from Ystad to Höllviken. North of Höllviken, near Foteviken or on the coast at Skanör there may be stretches of beach without a road next to it. And if not, allemansrätten also applies to fields.

5.2 Cycling tourism in Sweden – Scania (Skåne)

Bicycles on the trains in Sweden

From the middle of June to the end of August you can take the bicycle with you on trains in Sweden.

Ta med cykeln på tåget

SJ upprepar fjolårets succé med cykel på tåget. Från den 14 juni - 31 augusti kan du ta med dig cykeln på tåget.

Nytt för sommaren 2009 är att du kan ta med dig cykeln och cykelkärra ombord på samtliga tåg med bagageutrymmen som kör mellan orterna som du finner nedan (se PDF). Från den 8 juni kan du boka cykel på tåget.

Pris

Förläng din cykelsemester genom att ta tåget genom större delen av Sverige. För 149 kr per cykel och sträcka tar du med dig cykeln på SJs tåg*. Du når från Åre i norr till Malmö i söder, från Stockholm i öst och Göteborg i väst. Njut av Sveriges unika natur och res miljövänligt i sommar med SJ.

* Bokningsavgift tillkommer.

Bring your bike in southern Sweden

In southern Sweden you may take your bicycle with you on the train.

There is a limited amount of bicycle storage space on the Oresund trains serving the Gothenburg-Copenhagen and Kalmar-Alvesta-Copenhagen routes. Book a space for your bike with your train ticket on (+46) 0771- 75 75 75 or at SJ Resebutik (SJ's own travel offices). If you wish to take your

⁴ www.sydsverige.dk/?pageID=338

bike on a train in Skåne, the local transport provider (Skånetrafiken) reserves a certain amount of space on the Pågatågen train.

www.sj.se/sj/jsp/polopoly.jsp?d=112&a=2748&l=en



Bicycles can be taken on board, provided there is sufficient space. You can take your bicycle on a Pågatåg train at any time between 15 June–15 August. During the rest of the year, bicycles are not permitted on specific Monday–Friday rush hour departures. These departures are clearly marked in the timetables.

Bicycles can be taken on board Öresund trains, with the exception of certain departures, marked by the crossed-out bicycle symbol in the timetables.

On the regional buses bicycles are permitted throughout the year (maximum of two bicycles) if room is available and the bus is equipped with a bicycle frame support. This service does not apply on the city buses.

Bicycles must have their own ticket and incur a child's fare.

www.sknetrafiken.se/

Since 2007 there have (again) been summer sailings between Allinge and Simrishamn, by Christiansøfarten, cf.

Table 11 and Table 97. – In 2009 the sailing season was 19/6 to 23/8, with two daily roundtrips, and an additional one on Fridays.

Table 97 Ferry schedule, Allinge-Simrishamn, 19/6-23/8 2009

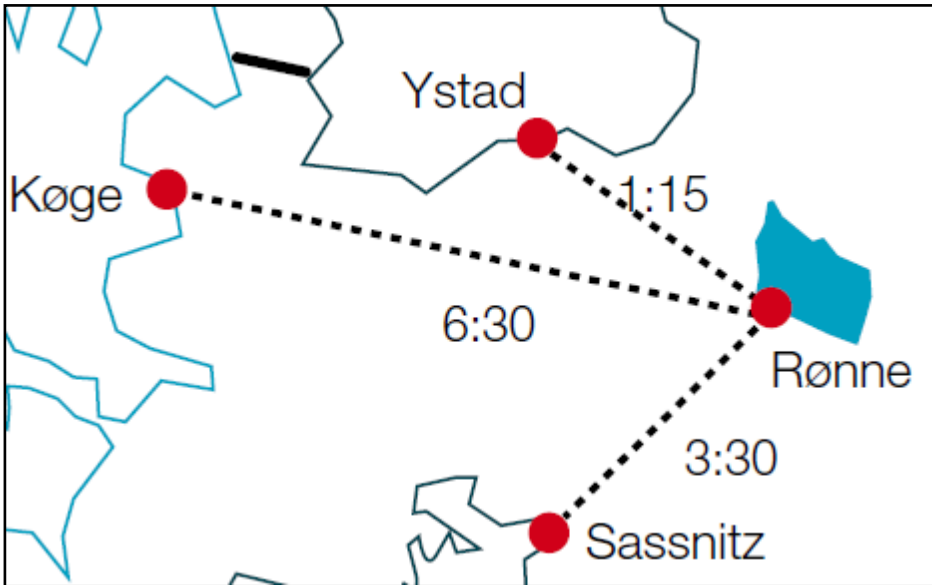
19/6 - 23/8 ALLINGE - SIMRISHAMN									19/6 - 23/8 SIMRISHAMN - ALLINGE								
Afg./Abf./Dep. Allinge	M	T	O	T	F	L	S	Ank. Simrishamn	Afg./Abf./Dep. Simrishamn	M	T	O	T	F	L	S	Ank. Allinge
08.00 HSC B. EXPRESS	●	●	●	●	●	●	●	09.00	09.30 HSC B. EXPRESS	●	●	●	●	●	●	●	10.00
15.00 HSC B. EXPRESS					●			16.00	16.15 HSC B. EXPRESS					●			17.15
17.45 HSC B. EXPRESS	●	●	●	●	●	●	●	18.45	19.00 HSC B. EXPRESS	●	●	●	●	●	●	●	20.00

Source: www.bornholmsexpress.dk

Bornholmstrafikken sails all year on the route Rønne-Ystad, with up to nine daily roundtrips during the high season. This is the main route to/from Bornholm, cf.

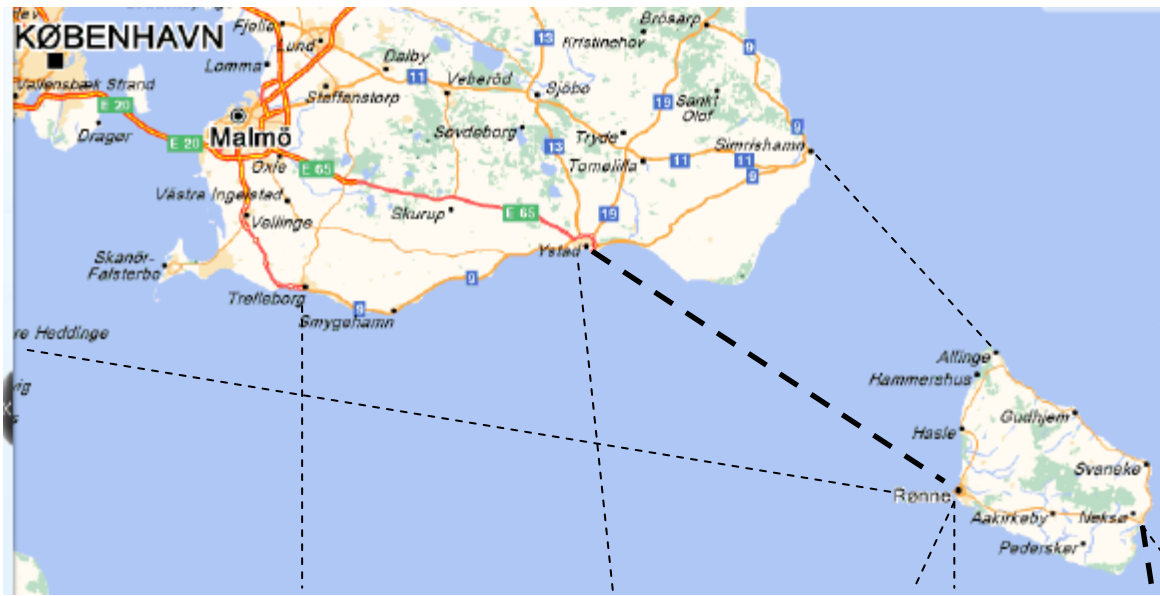
Table 11.

Figure 28 The three routes of BornholmsTrafikken, including Rønne-Ystad



Source: www.Bornholmstrafikken.dk

Figure 29 Ferry ports on Bornholm and in Scania, Southern Sweden



Source: Viamichelin.com.

Figure 30 Map section with points of interest and camping sites etc. in Scania



Source: Skånes Turistråd, skaneturist.nu, skane.com

Ferries connecting to Vellinge, Scania, Sweden, from Germany and Poland – and Bornholm:

- Vellinge is also easily accessible by ferries arriving from Germany and Poland:
- Trelleborg/Sassnitz-Rostock, Scandlines
- Trelleborg/Travemünde-Rostock, TT-Line
- Ystad-Swinoujście, Polferries
- Ystad-Swinoujście, Unity Line

Also:

- Rønne-Ystad, BornholmsTrafikken

Source: Google's cache-version 8 July 2009 of www.vellinge.se/uppleva-gora/turism/in-english/getting-here4/,

The fastest ferry connection to Ystad is from Rønne (1 hour 15 minutes), and the fastest connection to Trelleborg is from Sassnitz (4 hours). – For those who will rent a bicycle in Scania there are opportunities several places. However, most monadic holiday cyclists use their own bicycle.

There are low cost flights by Wizzair.com from Gdansk, Warsaw and Wroclaw to Malmö, among other cities. Perhaps a little surprising, it is actually possible to check in a bicycle, under strict packaging requirement. This is the formal statement on the website of Wizzair.com, under the section sporting equipment:

“A bicycle can only be accepted for carriage if they are packed in nylon sacks, the wheels and pedals are removed and the handlebars turned parallel. They may also be accepted if packed in cardboard provided the tyres are deflated. - Bicycle must always be carried as checked baggage in the baggage hold.”

Prices start at 84 PLN Gdansk-Malmö return when paying by a Visa or MasterCard, more than half of which is the payment fee (of 2 * 5 EUR). On top of this comes luggage, the bicycle, if any. There is a discount when checking in the luggage online. Even so, the additional price to the the bicycle on board as luggage may be quite considerable. Alternatively bicycles and be rented at Foteviken Viking Village, or in Malmö, or at camping sites etc.

5.3 Swedish cyclists vs. other Swedes visiting Denmark

Turism — Vellinge kommun - [Oversæt denne side]Välkommen till Vellinge-Sveriges finaste stränder och fåglarnas paradis Medverka i enkät angående cykelsemester, klicka här att komma till enkäten.

www.vellinge.se/uppleva-gora/turism/

There are 15 motives and activities which are significantly more prevalent among those Swedish visitors to Denmark who cycle a lot than those Swedish visitors to Denmark which to not.

Table 98 Significant differences in motives and activities between Swedish tourists in Denmark: Those who cycle a lot vs. other Swedish visitors to Denmark

Variables	t-test for Equality of Means		
	t	Sig. (2-tailed)	Mean Difference
37.Possibility of bicycling	10,958	,000	,641
39.Angle in lakes, streams or ocean	9,501	,000	,991
39.Yachting	8,496	,000	,770
39.Visit or experience port areas	5,417	,000	1,375
39.Cultural events	4,235	,000	1,025
39.Visit spa, health or fitness centre	4,182	,000	,707
39.Sightseeing	4,046	,000	1,047
39.Swimming in lakes, at beaches	3,561	,000	1,035
39.Cook your own food	3,230	,001	,991
39.Sunbathe	2,552	,011	,753
39.Play golf	2,513	,012	,524
37.Nature (beach, forest)	2,385	,017	,224
37.Art exhibition/cultural-historic sight	2,359	,019	,207
39.Visit attractions	2,296	,022	,661
39.Long walks or hikes	2,271	,023	,610
37.Attractions/amusements	-1,964	,050	-,194

Source: Based on a national survey commissioned by VisitDenmark in 2004.

Note: The subsample consisted of 740 Swedish holiday-makers, of which 26 were cyclists.

There are a number of other significant differences between Swedish “heavy cycling” vs. other Swedish visitors to Denmark:

- Those who cycle a lot tend to stay at camping sites more than other Swedish visitors.
- The Swedish cyclists tend to visit Funen, Bornholm or South Jutland more than other Swedish visitors. Thus Bornholm gets 19% of the Swedish cycling tourists in Denmark.
- The length of stay is twice as long for cyclists than for non-cyclists.
- However, the cyclists spend less per night on accommodation than other Swedish visitors to Denmark.
- Sealand – and in particular West and South Sealand - is less popular among Swedish cycling tourists in Denmark than among other Swedish visitors to Denmark.
- Swedish cycling tourists stay less at hotels than other Swedish visitors to Denmark.

Table 99 Other significant differences between Swedish tourist in Denmark: Those who cycle a lot vs. other Swedish visitors to Denmark

Variables	Mean	Mean	Mean	t-test for Equality of Means	
	cyclists	others	difference	t	Sig. (2-tailed)
Camping	31%	11%	0,20	3,195	0,001
Funen	12%	2%	0,09	2,958	0,003
Bornholm	19%	5%	0,14	2,929	0,004
South_Jutland	8%	1%	0,06	2,671	0,008
Nights (max22)	6,67	3,26	3,40	2,532	0,014
Per_night_EUR	33,28	44,62	-11,34	-2,070	0,039
Sealand	4%	21%	-0,17	-2,137	0,033
W_S_Sealand	0%	16%	-0,16	-2,220	0,027
Hotels	19%	43%	-0,24	-2,404	0,016

Source: Based on a national survey commissioned by VisitDenmark in 2004.

Note: The subsample consisted of 740 Swedish holiday-makers, of which 26 were cyclists.

6 Germany

6.1 Germany as a cycling tourism market

As much as 43% of Germans cycle as a holiday activity (ADFC 2009, cf. Table 100). However, in a large European survey (from a EU project called Dateline) with over 37,000 journeys of at least 100 km undertaken by German travellers in 2002, only 532 or 1.4% of these journeys had bicycle as one of the modes of transport. Also, as was indicated in Table 25 that Germans are eager cyclists, when visiting Bornholm: Over half (52%!) of the passengers on the route Rønne-Sassnitz, which are generally Germans, cycle on their holiday – on Bornholm. So, why is there such a big difference between the European 2002-survey and the Bornholm 2002 surveys? Maybe German travellers do not think of bicycling, when asked about modes of transport, since they see bicycling not as a mode of transport, but merely as a holiday activity like walking, swimming, sunbathing, fishing, and relaxing.

Cycling as a holiday activity covers a wide spectrum. Although consistently over 40% of German holiday-makers cycle as one of the activities undertaken during their holiday, between 11 and 15 percent of Germans over 14 have cycled often or very often during their holiday.

Table 100 Cycling as an activity among German holiday-makers 2002-2007

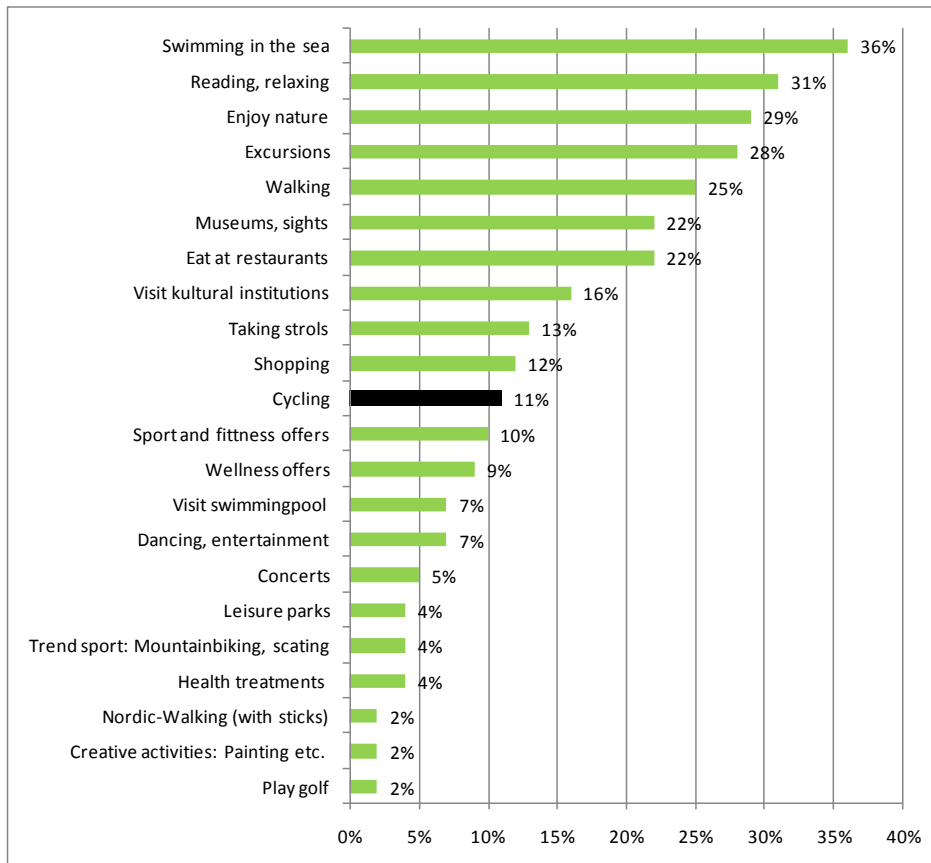
	Have cycled during holiday (this year)	Have cycled often or very often during holiday	Have cycled often or very often during holiday (mio., 14+)
2002	42,6%	11,6%	5,6
2003	43,5%	11,6%	5,6
2004	40,7%	12,0%	5,8
2005	45,4%	14,3%	6,9
2006	44,7%	14,9%	7,2
2007	43,1%	12,7%	6,2

Source: ADFC-Radreiseanalyse 2003-2008, F.U.R.

As many a 88% of the interviewed German bicycle tourists in 2007 cycled in Germany. (It is not quite clear, though, if this means that only 12% cycled outside of Germany, since some probably would have cycled both in Germany and in other countries). When quizzed in 2007, 22% of the German respondents planned to cycle in a foreign country in 2008 (ADFC, 2008).

In line with the “cycled often or very often” question mentioned above, cycling is one of the top three activities for around 11% of German holiday-makers.⁵ Cycling ranks as number 11 out of 22 holiday activities, only some of which are directly comparable with the activity of cycling. The 11% for cycling, i.e. when focusing on the top three activities, gives a realistic picture of what percentage of the German holiday-makers are genuine holiday cyclist.

Figure 31 Holiday activities for Germans

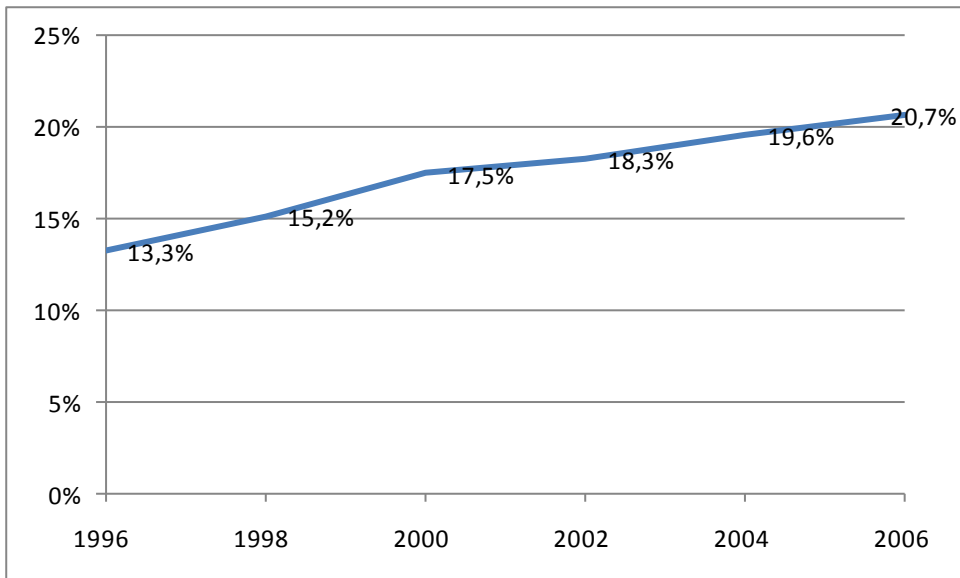


Source: Own translation from

www.wetteraukreis.de/imperia/md/content/wetteraukreis/bildung/folien_rad_und_wandertourismus.pdf

⁵ www.wetteraukreis.de/imperia/md/content/wetteraukreis/bildung/folien_rad_und_wandertourismus.pdf

Figure 32 Mountainbikes are getting increasingly popular in Germany



Source: AWA, cf. also adreyer.hs-harz.de/downloads/radtourismus.pdf, p. 10 (12).

20.7% of the German population who rides mountainbike (as a sport, 2006). These mountainbikers are composed of about 15-16% who does it from time to time, and 5% who do it frequently.⁶

The German magazine mountainBIKE has got 305.000 readers, by the way, 85% male, generally very active.⁷ – In the “ADFC Radreise-analyse” (cf. ADFC 2009) 68.6% of the respondents were male. – Whether cycling holidays are male or female dominated or if there is an even split, may depend both on the origin market and the destination and the precise formulation of the question.

(1) In a 2002-survey, cf. the next section, 6.2, cycles as a means of transport among German holiday-makers or travellers on journeys of more than 100 km in general, a significantly higher percentage of males than females used cycle. (2) In the survey of Polish cyclists on Bornholm in 2006, 24% of the males and 17% of the female respondents cycled on Bornholm, but with the given sample size (220 men, 217 women), the difference was not quite, but almost, statistically significant. (3a) For all visitors to Denmark (2004-survey), there were 8% of the female respondents who cycled very often (5 on a scale from 1 to 5), but only 7% of the male respondents. I.e. women were in the majority, but the difference was not significant. (3b) For German visitors to Denmark overall (2004-survey), 10% of the male respondents, and 9% of the female respondents cycled. The difference was not significant, though. (4a) For all nationalities under one visiting Bornholm, 19% of women but only 12% of men cycles (2004-survey). This

⁶ <http://de.statista.com/statistik/diagramm/studie/12566/umfrage/haeufigkeit-von-mountainbike-fahren/#info>

⁷ http://www.gujmedia.de/_content/20/70/207075/MPS_Factsheet_MountainBike_2009.pdf

difference is significant. – For Germans visiting Bornholm, 25% of the female respondents cycled very often, but only 15% of the male respondents (2004-survey). Due to the limited sample size the latter difference was not significant. (5) In the July 2009 survey of visitors to Bornholm coming on the Ystad-Rønne route, 28% of males and 39% of female respondents cycles (at all, as one of 22 activities), but travellers on the route were mostly Danes. – It is possible to sort holiday activities on a scale from very male oriented to very female oriented. For German visitors to Denmark, golf is the only one of 19 activities, which is done significantly more by men than by women, while four activities are done more by German women than by German men on holiday in Denmark (cooking, shopping, walking, relaxing). For Denmark overall as a holiday destination, cycling is evenly balanced among men and women, also among German visitors.

Cycling holidays on Bornholm, have got a relatively high proportion of females among German very frequently cycling visitors and among other very frequently cycling visitors as well, with the exception of Polish cyclists on Bornholm, where males are in the majority.

Table 101 Cycling and 18 other activities undertaken very often by German men and women visiting Denmark on holiday (2004)

	Altivities. 5 on 1-5 scale.	All Germans	Male Germans	Female Germans	Difference of means	t-value of difference	Sig. (2-tailed)
1	Q39_Relax_always	67%	65%	71%	-5%	-2,719	,007
2	Q39_Cooking_always	55%	52%	62%	-10%	-4,768	,000
3	Q39_Walks_always	34%	32%	39%	-7%	-3,354	,001
4	Q39_Playing_always	28%	27%	29%	-2%	-1,160	,246
5	Q39_Sunbathe_always	26%	25%	27%	-3%	-1,460	,144
6	Q39_Swimming_always	17%	17%	17%	0%	-,287	,774
7	Q39_Ports_always	11%	11%	13%	-2%	-1,657	,098
8	Q39_Cycling_always	10%	10%	9%	1%	,623	,534
9	Q39_Sightseeing_always	10%	10%	9%	1%	,797	,426
10	Q39_Fishing_always	8%	8%	9%	-1%	-1,009	,313
11	Q39_Shopping_always	7%	5%	10%	-4%	-3,910	,000
12	Q39_Attractions_always	6%	7%	6%	1%	1,028	,304
13	Q39_Restaurants_always	5%	5%	5%	0%	,025	,980
14	Q39_Going_out_always	3%	3%	4%	-1%	-1,206	,228
15	Q39_New_people_always	3%	2%	3%	-1%	-1,687	,092
16	Q39_Golf_always	3%	3%	2%	1%	1,954	,051
17	Q39_Events_always	2%	2%	2%	0%	-,238	,812
18	Q39_Yachting_always	2%	2%	2%	1%	,959	,338
19	Q39_Spa_always	1%	1%	2%	0%	-,890	,373
	n, respondents	2.343	1.434	909			

Source: Based on a survey commissioned by VisitDenmark in 2004.

In the “ADFC Radreise-analyse” (cf. ADFC 2009) only 13% of respondents characterized their cycling holiday as a mountainbike holiday. As much as 79% answered they had (an ordinary) cycling holiday, while 8% had a racing cycle holiday. It could be that some of the 79% actually had a mountainbike, although the labelled their holiday as (merely) a “cycling holiday”. This explanation is supported by the fact that 21% of the German population ride mountainbikes (cf . Figure 32). For comparison, as much as 62% of the Polish cycling holiday-makers on Bornholm use a mountainbike (cf. Table 63), their own. Maybe one explanation of this difference is that 92.7% of the respondents in “ADFC Radreiseanalyse 2008” were over 39 years old, while the average age among the Polish cyclists on Bornholm was just 38 years. It could be that elder cyclists then to use ordinary bicycles, while the younger ones use mountainbikes, although no significant age difference between mountainbikers and those riding ordinary bicycles, was found among the Polish holiday cyclists on Bornholm. - The profile of the German cycling holiday-makers on Bornholm is families (with or without children) who bring their cars, stay in holiday cottages (the same one for at least one week), and cycle as one of several activities.

According to Trendscape 2008 (cf. ADFC 2009), as many as 64% of German holiday cyclists cycle between accommodations, while 36% stay at the same place of accommodation throughout their cycling holiday. – According to the same source, 25% of mountainbike-holiday-makers had tried to use a GPS for directions during a cycle holiday. For racing-cyclists it was 12%, and for “ordinary” holiday cyclists (both those staying at the same place all nights and those moving between accommodations) it was just 10% how had tried to use a GPS during a cycle holiday. The weighted average for “having tried to use a GPS during a cycle holiday” becomes 12%.

Table 102 Star tour holiday cyclists, stage tour holiday cyclists, types of cycles, and GPS usage. Germany 2008

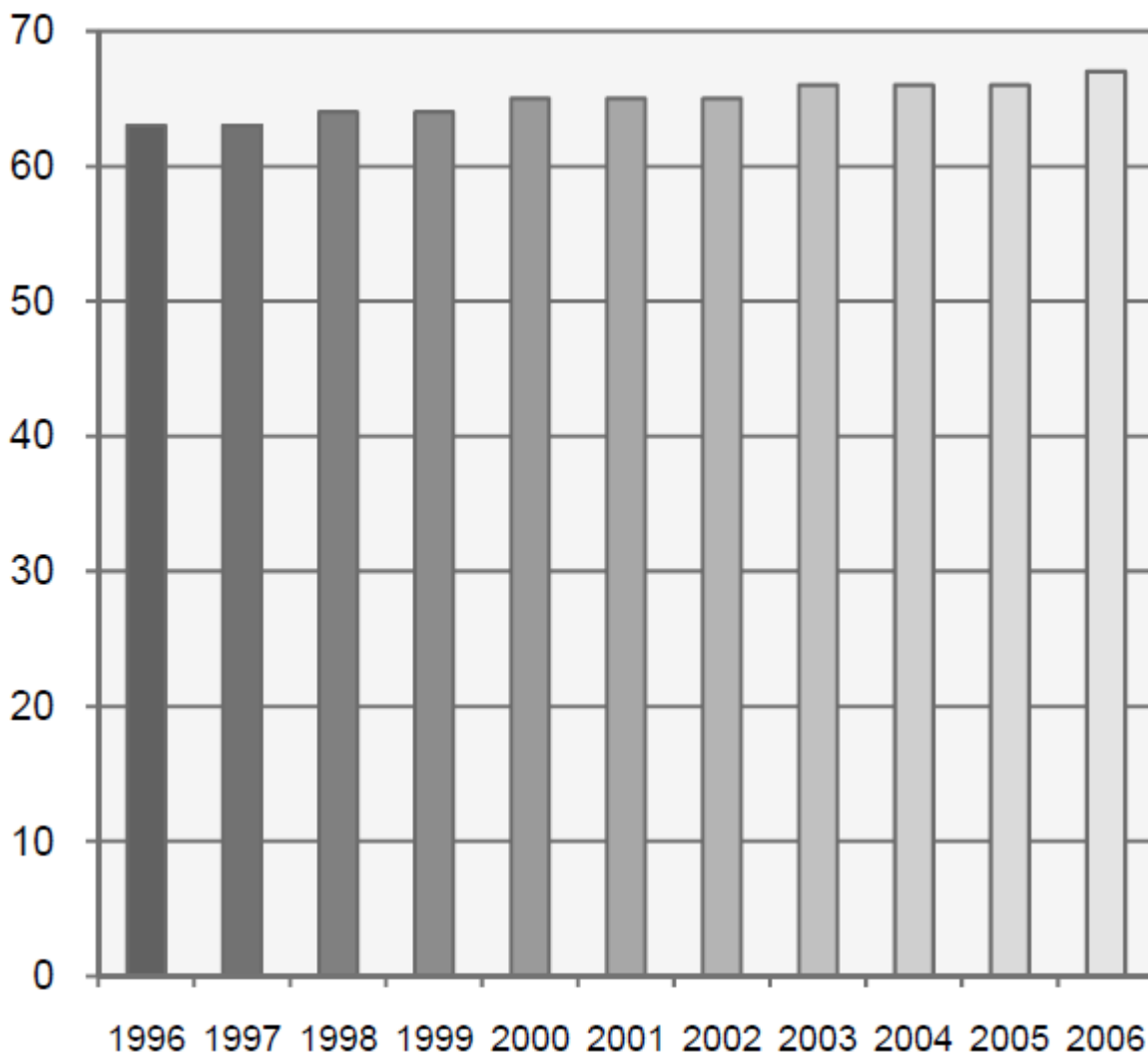
Type of cycle holiday	Same place of accommodation	Changing accommodations	Total	Have tried to use a GPS
(Ordinary) Cycle holiday	28%	51%	79%	10%
Mountainbike holiday	6%	7%	13%	25%
Racing cycle holiday	2%	6%	8%	12%
Total	36%	64%	100%	12%

Source: Based on Trendscape 2008 (cf. ADFC 2009).

The German expression for holiday cyclists who stay at a single place of accommodation during their cycle holiday is “Radwanderer”, which has been labelled “stage tour holiday cyclists” above. The German expression for “Regio-radler”, which has been labelled “star holiday cyclists” above.

For comparison (with the above Table 102), 27% of the Polish cycling tourists on Bornholm have a GPS device AND have tried to download GPS files (cf. Table 86), and they tend to ride a mountainbike (62% of them do, 38% use ordinary bicycles, none use racing cycles),

Figure 33 Number of bicycles in Germany, 1996-2006



Source: adreyer.hs-harz.de/downloads/radtourismus.pdf, p. 11 (13).

There are some 68 million bicycles in Germany. – The total population is 82 million.

Figure 34 Requirements for cycle stages and their start and finish locations – from a German point of view

- Length 40-50 km
- Good accessibility of the starting and ending points by rail or road (car)
- Existence of bicycle friendly accommodations
- Existence of bicycle friendly restaurants and other food outlets
- Existence of bicycle repair workshops
- Possibility of transport of bicycles by taxi
- Nice atmosphere at the cycle destination(s)

Source: Own translation from adreyer.hs-harz.de/downloads/radtourismus.pdf, p. 62 (64).

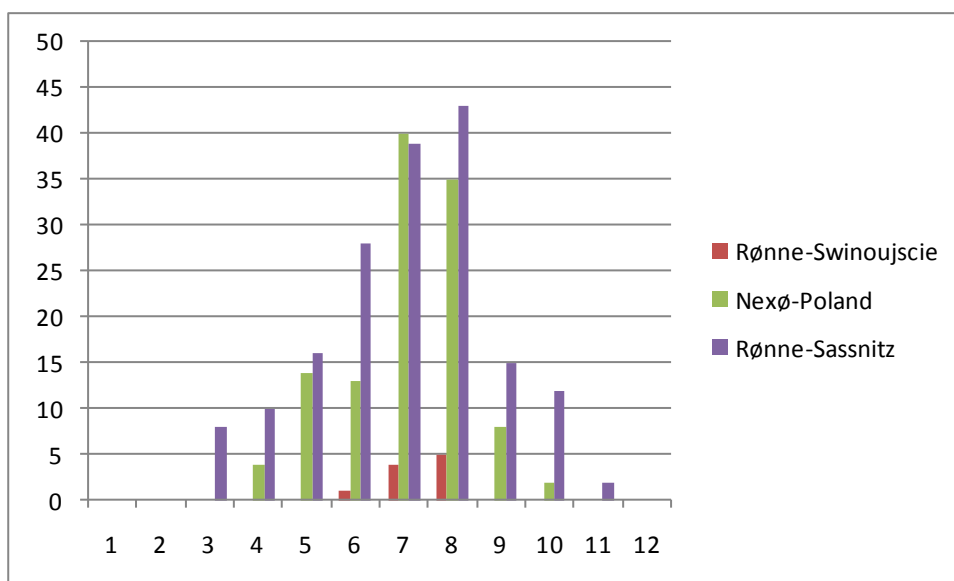
Table 103 Ferry schedules, Germany-Bornholm: Sassnitz-Rønne, 2010

SASSNITZ > RØNNE		27. MAR. - 24. OKT. 2010						27. MAR. - 24. OKT. 2010						RØNNE > SASSNITZ	
		ROPAX FÆRGE	ALM. FÆRGE	ALM./ROPAX	ROPAX FÆRGE	ALM. FÆRGE	ALM./ROPAX	ROPAX FÆRGE	ALM. FÆRGE	ALM./ROPAX					
27.03 - 30.04															
Afg.	Ank.	M	T	O	T	F	L	S							
11:25	14:55	• a)				•			•					•	
a) Sejler kun d. 5/4.															
01.05 - 09.06															
Afg.	Ank.	M	T	O	T	F	L	S							
11:25	14:55					•			• a)					•	
12:15	15:45													•	
a) Sejler ikke d. 1/5, 8/5 og d. 29/5.															
10.06 - 25.06															
Afg.	Ank.	M	T	O	T	F	L	S							
11:25	14:55	•	•	•	•	•	•	•						•	
12:15	15:45													•	
a) Sejler kun d. 25/6.															
26.06 - 15.08															
Afg.	Ank.	M	T	O	T	F	L	S							
03:30	07:00													•	
12:15	15:45	•	•	•	•	•	•	•						•	
a) Sejler kun d. 4/9, 11/9 og d. 18/9.															
16.08 - 31.08															
Afg.	Ank.	M	T	O	T	F	L	S							
03:30	07:00													•	
11:25	14:55	•	•	•	•	•	•	•						•	
12:15	15:45													•	
a) Sejler kun d. 4/9, 11/9 og d. 18/9.															
01.09 - 24.10															
Afg.	Ank.	M	T	O	T	F	L	S							
11:25	14:55													•	
12:15	15:45													• a)	
a) Sejler kun d. 4/9, 11/9 og d. 18/9.															
27.03 - 30.04															
Afg.	Ank.	M	T	O	T	F	L	S							
07:30	11:00	• a)							•					•	
a) Sejler kun d. 5/4.															
01.05 - 09.06															
Afg.	Ank.	M	T	O	T	F	L	S							
07:30	11:00								•					• a)	
07:45	11:15													•	
a) Sejler ikke d. 1/5, 8/5 og d. 29/5.															
10.06 - 25.06															
Afg.	Ank.	M	T	O	T	F	L	S							
07:30	11:00	•	•	•	•	•	•	•						•	
07:45	11:30													•	
22:00	01:30													• a)	
a) Sejler kun d. 25/6.															
26.06 - 15.08															
Afg.	Ank.	M	T	O	T	F	L	S							
07:45	11:15	•	•	•	•	•	•	•						•	
22:00	01:30													•	
a) Sejler kun d. 4/9, 11/9 og d. 18/9.															
16.08 - 31.08															
Afg.	Ank.	M	T	O	T	F	L	S							
07:30	11:00	•	•	•	•	•	•	•						•	
07:45	11:30													•	
22:00	01:30													•	
a) Sejler kun d. 4/9, 11/9 og d. 18/9.															
01.09 - 24.10															
Afg.	Ank.	M	T	O	T	F	L	S							
07:30	11:00													•	
07:45	11:30													• a)	
a) Sejler kun d. 4/9, 11/9 og d. 18/9.															

Source: Bornholmstrafikken.dk.

2010 BornholmsTrafikken will sail on the route Rønne-Sassnitz from 27/3 to 24/10. The sailing season on the route Rønne-Sassnitz was from 9/4 (Easter) to 1/11 2009, i.e. from April to November. - In 2009 there were only 9 rounds on the Polferries route Swinoujscie-Rønne, which is the lowest number of roundtrips since 1994, where there were also 9 roundtrips. – In 2008 the sailing season was longer on the route Rønne-Sassnitz than on the routes Poland-Rønne. In 2008 there were 173 roundtrips on the route Rønne-Sassnitz, 116 rounds on the routes Poland-Nexø, and 10 rounds on the route Swinoujscie-Rønne.

Figure 35 Roundtrips per month 2008: Rønne-Poland, Nexø-Poland, Rønne-Sassnitz



Source: Statistics Denmark, Statistikbanken.dk.

The school summer holiday season in Mecklenburg-Vorpommern and Schleswig-Holstein in Germany is 12.07. - 21.08 in 2010. The period is the same in Berlin and Brandenburg, except it starts four days earlier.⁸ Tourism in general and cycling tourism specifically in Northern Germany, Northern Poland, on Bornholm and in Southern Sweden is rather concentrated to the peak summer period. The German and Polish season is more concentrated in August, while Danes and Swedes have their peak holiday month in July.

⁸ http://www.kmk.org/fileadmin/pdf/Ferienkalender/Ferien09_10.pdf

Table 104 Bicycle rental, Rønne, Bornholm

Number of days	Mountainbike DKK	Mountainbike EUR
1	65	9
2	130	17
3	190	26
4	240	32
5	280	38
6	310	42
7	330	44
Per extra day	30	4

Source: www.bornholms-cykeludlejning.dk

The starting point of a four-country cycle route could be Heringsdorf, which may be reached by train or car. – Cycle 24 km to Miedzzydroje (Mistroy). Cycle 45 km to Rewal. Cycle 43 km to Kolobrzeg. Cycle 31 km to Mielno, and 15 km to Koszalin. – Cycle on the cycle trails in the Koszalin area. Cycle 15 km back to Mielno. – Cycle 76 km to Ustka. – Take the ferry to Bornholm on Wednesday or Saturday morning. – Cycle around Bornholm. – Take ferry from Rønne to Swinjoucie on Saturday. – Or take the ferry to Ystad. – Cycle to Foteviken. – Cycle around Skåne, back to Ystad. Go from Ystad to Swinjoucie. Cycle from Swinoujcie to Heringsdorf. etc. – Anyway: Take the ferry from Kolobrzeg to Bornholm. Cycle along north coast, then the west coast. – Or start in Kolobrzeg. – Cycle to Mielno, Koszalin, Koszalin county, Mielno, Ustka, ferry to Bornholm.

6.2 Insights from a survey among German travellers (2002): How are German cycling tourist different from other German holiday-makers?

Only 10% of German cycling tourists use the cycle as their main mode of transport, while 90% use another mode of transport to get to their destination.

Table 105 Bicycle as a mode of transport among German travellers

Cycle	Cyclists, n	Cyclists %
First	51	10%
Second	362	68%
Third	113	21%
Fourth	6	1%
Total	532	100%

Note: Based on journeys of at least 100 km (37047 journeys, of which 532 involved cycling as a mode of transport).

Although car is the main mode of transport among German travellers overall, as well as among those Germans who use the bicycle as one of their means of transportation, train is used by over a third of the cycling travellers, but only by 8% of the non-cyclists. Also motor home and ferry is used relatively more by cycling than non-cycling German travellers.

Table 106 Mode of transport among German travellers

MAIN mode of transport	Cycle_tourist		Total
	No	Yes	
10 Car	58,6%	45,9%	58,4%
20 Bus / coach	8,2%		8,1%
30 Train	7,8%	34,4%	8,2%
40 Aeroplane	21,5%	4,1%	21,2%
50 Ship / ferry	1,2%	2,6%	1,2%
60 Motorcycle	,7%		,6%
71 Motor home	1,9%	3,4%	2,0%
72 Truck	,0%		,0%
73 Bicycle		9,6%	,1%
76 Other	,1%		,1%
Total	100,0%	100,0%	100,0%
Total, n	37047	532	37579

Note: Based on journeys of at least 100 km.

Ferry is used by 71/532=13% of German cycling travellers, mostly holiday-makers. Ferry is typically the second mode of transport for those cyclists using a ferry, with car (or motor home) or train as the second mode of transport. The combination "car and ferry" was used by 51/532=10% of the cyclists, or by 51/244=21% of those car travellers who cycle on their journey (holiday).

Table 107 Ferry as a mode of transport among German cycling travellers

Ferry	Cyclists, n	% of cyclists
First	14	3%
Second	51	10%
Third	6	1%
Fourth	0	0%
Total	71	13%

Note: Based on journeys of at least 100 km.

Germany as a destination account for 56% of the journeys (100 km+) which involves cycling as a mode of transport, whereas this is the case for 46% of journeys undertaken by travellers from Germany. Thus domestic journeys are slightly overrepresented among the journeys involving cycling. 12 European countries appeared among the cycle destinations in the survey. Some other typical cycling destinations, such as Denmark, happened not to be represented among the cycle destinations. Neither was the UK.

Table 108 Destinations for German cycling tourists

Destination country	Cycle_tourist		Total	Cycle index
	No	Yes		
Germany	45,9%	55,8%	46,0%	1,21
Italy	7,6%	13,0%	7,7%	1,69
Belgium	0,3%	8,5%	0,4%	18,92
Austria	6,8%	6,6%	6,8%	0,97
France	3,6%	3,4%	3,6%	0,94
Rep. Ireland	0,3%	2,6%	0,4%	7,33
Netherlands	1,5%	2,6%	1,5%	1,72
Poland	1,3%	2,3%	1,3%	1,72
Czech Rep.	1,0%	1,7%	1,0%	1,73
Hungary	1,5%	1,7%	1,5%	1,16
Sweden	0,8%	1,1%	0,8%	1,44
Spain	7,9%	0,4%	7,8%	0,05
Other	21,5%	0,4%	21,2%	0,02
Total, %	100,0%	100,0%	100,0%	1,00
Total, n	37047	532	37579	

Note: The "cycle index" is the total percentage divided by the cycling percentage.

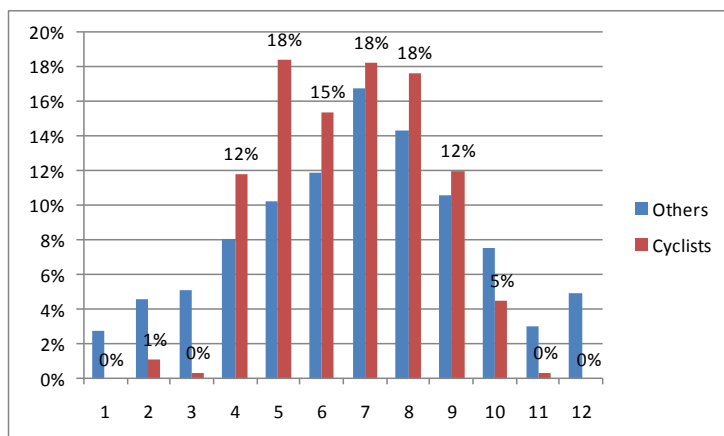
The cycle season among German travellers is from April to and including September. These months account for 94% of the journeys (100 km+) involving cycling. The four months May to August account for 70% of journeys involving cycling, with remarkably little difference between

each of these months. April and September account for another 24%, leaving 6% to the rest of year.

Table 109 Travel month by cycling and non-cycling German travellers

Journey month	Cycle_tourist		Total
	No	Yes	
1	3%	0%	3%
2	5%	1%	5%
3	5%	0%	5%
4	8%	12%	8%
5	10%	18%	10%
6	12%	15%	12%
7	17%	18%	17%
8	14%	18%	14%
9	11%	12%	11%
10	8%	5%	8%
11	3%	0%	3%
12	5%	0%	5%
Total	100%	100%	100%
Total, n	37047	532	37579
Split, n	98,6%	1,4%	100,0%
Chi-square:	150,5	Sig.:	0,000

Figure 36 Cycling season among German travellers



International journey involving cycling were a little more seasonal than domestic ones. Thus, the Summer half of the year account for as many as 99% of international journeys involving cycling, while this is the case for just 89% of domestic journeys involving cycling. June and July are the peak months for domestic cycling journeys, while May, August and September were the most popular months for international cycling journeys, in the survey at hand.

Table 110 Travel season by domestic and international German cycling tourists

Cycle month	Cycle_tourist		Total
	Domestic	International	
1	0%	0%	0%
2	2%	0%	1%
3	0%	1%	0%
4	12%	12%	12%
5	10%	29%	18%
6	20%	9%	15%
7	28%	7%	18%
8	10%	26%	18%
9	8%	16%	12%
10	8%	0%	5%
11	1%	0%	0%
12	0%	0%	0%
April-Sept.	89%	99%	94%
Oct.-March	11%	1%	6%
Total, %	100%	100%	100%
Total, n	288	244	532

Although people can rent a bicycle on holidays, those who do not own a bicycle at home, do not cycle on holidays at all. This holds true for German travellers as well as for travellers from other European countries. Homes with at least four bicycles account for 59% of journeys involving cycling whereas homes with just one bicycle account for just 4% of cycling journeys. This result should be seen in conjunction with the size of the travel party (or size of the household, and number of non-household members participating in the journey). Thus, for journeys involving cycling, it is relatively common of two non-household members to take part. Whether this means that two, three, four or five persons normally cycle together is hard to tell.

Now, below significant differences between cycle journeys and other journey undertaken by German residents are summed up.

Table 111 Things which are done MORE on journeys which involves cycling than other journeys

Variables	Group Statistics		Mean Difference	t-test for Equality of Means		
	Cyclists Mean	Others Mean		t	Sig. (2-tailed)	*
Any extra overnight destinations	60%	8%	0,51	41,64	0,000	**
No. of additional overnight destinations	2,73	0,31	2,42	34,54	0,000	**
No. of bicycles	4,81	2,61	2,21	28,21	0,000	**
Belgium (destination)	8%	0%	0,08	28,19	0,000	**
P_Discount (on public transports)	36%	10%	0,26	19,78	0,000	**
J_H_other (any additional holiday journeys)	31%	11%	0,20	14,62	0,000	**
Persons over 14 in household	2,84	2,31	0,53	14,13	0,000	**
No. of additional other private journeys	0,42	0,07	0,35	12,91	0,000	**
No. of additional holiday journeys	0,64	0,22	0,42	12,08	0,000	**
Holiday journeys of the person's household	2,33	1,86	0,47	12,05	0,000	**
DE1_Baden_W (from)	27%	11%	0,16	11,96	0,000	**
From_Germany_South	44%	22%	0,22	11,86	0,000	**
Long holiday journeys in the person's household	2,29	1,84	0,45	11,53	0,000	**
Two_bicycles_min	96%	77%	0,19	10,45	0,000	**
DEE_Sachsen_Anhalt (from)	12%	4%	0,09	9,93	0,000	**
Ireland	3%	0%	0,02	8,83	0,000	**
J_D_Amsterdam (destination)	2%	0%	0,01	8,35	0,000	**
Holiday	89%	74%	0,15	7,92	0,000	**
Any_bicycles	100%	90%	0,10	7,84	0,000	**
Private journeys of the person's household	1,29	0,90	0,39	7,26	0,000	**
No. of persons in household	3,21	2,83	0,38	7,20	0,000	**
holiday journeys in total of the person	1,97	1,71	0,26	6,82	0,000	**
long holiday journeys in total of the person	1,95	1,70	0,25	6,66	0,000	**
J_P_other	6%	2%	0,04	5,91	0,000	**
Germany_West	14%	7%	0,07	5,81	0,000	**
private journeys in total of the person	1,03	0,76	0,27	5,67	0,000	**
No. of persons per household in classes	3,06	2,80	0,26	5,23	0,000	**
long other private journeys in the person's household	1,05	0,82	0,24	4,77	0,000	**
Italy (destination)	13%	8%	0,05	4,62	0,000	**
Germany (destination)	56%	46%	0,10	4,58	0,000	**
P_Drivers_licence	84%	76%	0,08	4,37	0,000	**
Leisure (purpose of journey)	98%	94%	0,04	4,33	0,000	**
P_Gender (% males)	60%	51%	0,09	4,08	0,000	**
DE2_Bayern (from)	17%	12%	0,06	3,89	0,000	**
J_SUMMER (June, July, August)	51%	43%	0,08	3,84	0,000	**
Employment	53%	46%	0,07	3,60	0,000	**
long other private journeys in total of the person	0,85	0,69	0,16	3,58	0,000	**
J_B_other	4%	2%	0,02	3,35	0,001	**
Germany_East (from)	17%	13%	0,04	2,80	0,005	**
P_Season_ticket	17%	13%	0,04	2,69	0,007	**
DE8_Vorpommern (from)	6%	4%	0,02	2,48	0,013	*
DED_Sachsen (from)	8%	6%	0,02	2,23	0,026	*
From_Germany_East	34%	29%	0,04	2,10	0,035	*
Netherlands (destination)	3%	2%	0,01	2,08	0,037	*

Table 112 Things which are done LESS on journeys which involves cycling than other journeys

Variables	Group Statistics		Mean Difference	t-test for Equality of Means		
	Cyclists Mean	Others Mean		t	Sig. (2-tailed)	*
P_AGE	42,60	44,32	-1,71	-1,98	0,047	*
Norway	0%	1%	-0,01	-2,14	0,032	*
Germany_South	11%	14%	-0,03	-2,17	0,030	*
Mobile phone	77%	81%	-0,04	-2,25	0,024	*
Tunesia	0%	1%	-0,01	-2,26	0,024	*
UK	0%	1%	-0,01	-2,27	0,023	*
Portugal	0%	1%	-0,01	-2,38	0,017	*
USA	0%	1%	-0,01	-2,41	0,016	*
HH_private_car	87%	90%	-0,03	-2,59	0,010	**
Croatia	0%	1%	-0,01	-2,73	0,006	**
Denmark	0%	1%	-0,01	-2,84	0,004	**
HH_INTER	44%	50%	-0,06	-2,87	0,004	**
total duration of all business journeys performed	0,23	0,94	-0,71	-3,05	0,002	**
HH_FAX	25%	31%	-0,06	-3,06	0,002	**
DE6_Hamburg	1%	4%	-0,03	-3,12	0,002	**
Switzerland	0%	2%	-0,02	-3,46	0,001	**
total distance of all business journeys performed	53,44	326,95	-273,52	-3,50	0,000	**
J_D_Other	8%	13%	-0,05	-3,53	0,000	**
J_D_SP_Mainland	0%	2%	-0,02	-3,59	0,000	**
business journeys in total of the person	17%	33%	-0,16	-3,63	0,000	**
Greece	0%	2%	-0,02	-3,68	0,000	**
DE3_Berlin	3%	7%	-0,04	-3,79	0,000	**
Persons 0 to 14	0,37	0,52	-0,15	-3,82	0,000	**
DEC_Saarland	1%	4%	-0,03	-3,82	0,000	**
HH_company_car	9%	15%	-0,06	-3,83	0,000	**
PPP_Journey_EUR	265,23	322,41	-57,17	-3,87	0,000	**
J_D_Other_2000_plus	0%	4%	-0,03	-3,92	0,000	**
International	46%	55%	-0,09	-4,01	0,000	**
No. of company cars	0,09	0,17	-0,08	-4,18	0,000	**
long business journeys in total of the person	0,13	0,30	-0,17	-4,24	0,000	**
Turkey	0%	3%	-0,03	-4,30	0,000	**
Business	2%	6%	-0,04	-4,33	0,000	**
DEG_Thüringen	0%	4%	-0,04	-4,55	0,000	**
DEF_Schleswig_H	0%	4%	-0,04	-4,67	0,000	**
Business journeys of the person's household	0,30	0,58	-0,28	-5,04	0,000	**
Persons under 5	0,05	0,15	-0,10	-5,14	0,000	**
J_D_SP_Islands	0%	6%	-0,05	-5,23	0,000	**
Were there any excursions	2%	8%	-0,06	-5,34	0,000	**
Private	9%	20%	-0,11	-6,13	0,000	**
DE9_Niedersachsen	0%	7%	-0,07	-6,18	0,000	**
Spain	0%	8%	-0,08	-6,45	0,000	**
long business journeys in the person's household	18%	52%	-0,34	-6,48	0,000	**
From_Germany_West	17%	30%	-0,13	-6,62	0,000	**
total distance of all holiday journeys performed	2384	3944	-1559,93	-6,75	0,000	**
P_J_Transport_EUR	36,14	78,10	-41,96	-7,44	0,000	**
Distance	450	942	-492,38	-7,48	0,000	**
From_Germany_North	5%	18%	-0,13	-7,55	0,000	**
DEA_Nordrhein_W	1%	12%	-0,11	-7,96	0,000	**
J_DIST_1000_plus	8%	24%	-0,16	-8,62	0,000	**
Airplane	4%	21%	-0,17	-9,73	0,000	**

These things cycling tourists do more than non-cycling travellers:

- 60% of journeys (of more than 100 km) involving cycling comprise additional overnight accommodations, apart from the main destination. This was the case of only 8% of other journeys.
- Persons who made journeys involving cycling were part of households which tended to have plenty of bicycles.
- When it comes to cycling, Belgium is a relatively popular destination among Germans.
- 36% of people who make journeys involving cycling get discount when travelling on public transport, which is the case for only 10% of other travellers.
- There are more persons over 14 in those households making journeys involving cycling, than in those household who undertake non-cycling journeys.
- People who cycle make more additional private journeys, more holiday journeys and more additional holiday journeys than those who don't.
- People from Southern Germany are relatively fond of cycling holidays.
- Ireland is a relatively popular cycling destination among Germans, and so is Amsterdam.
- Cycling is something which is undertaken on holiday journeys (as opposed to business journeys).
- There are more persons per household in cycling than in non-cycling households.
- Etc.

These things cycling tourists do less than non-cycling travellers:

- Only 4% of journeys involving cycling has airplane as their main mode of transport, while this is the case for as many as 21% of non-cycling journeys.
- Only 8% of journeys involving cycling are over 1000 km, whereas this is the case for as many as 24% on non-cycling holidays. Practically none of the journeys over 2000 km involves any cycling. This is related to the fact mentioned above.
- People from the West of Germany appeared relatively little in the survey at hand (as opposed those from the North, South and the East of Germany).
- Those who make journeys involving cycling travel only 450 km to get to their final destination (furthest away from their origin). This is less than half as far as those who do not cycle.
- Those who go to Spain (typically by airplane) don't cycle at all.

- Cycling is not something which is done much at other private journeys apart from genuine holiday journeys.
- Cycling is not undertaken much by households with children under five, or by households whose members travel much on business, and those who cycle tend not to have a company car in the household.
- Etc.
- And finally, those (at least 15 years of age), who make journeys involving cycling tend to be a little younger than those who don't.

A number of other variables were tested, but for those variables there were no significant differences between cyclists and non-cyclists.

7 Opportunities for developing cycling tourism in Northern Pomerania, on Bornholm and in Southern Sweden

Train travel is a relatively important mode of transport for cycle tourists.

In Poland there are relatively many cycling holiday-makers.

In West Pomeranian Voivodeship the excursionists would form an important basis for any new cycle trail in this voivodeship. In Brandenburg, around Berlin, the ratio of cycling excursionists to cycling tourists is 2.5 : 1.

The second most important group of users for cycle trails in West Pomerania would be people from other parts of Poland.

In Scania in Southern Sweden the domestic market is also very important, accounting for some 80% of bednights, and even 84% of camping bednights. When it comes to cycle-days, the domestic market would probably account for around 80%.

The right to public access in Sweden, i.e. the right to put up a tent in nature, may appeal to Polish cyclists. – However, experience from Bornholm shows, that Polish cycling holiday-makers prefer to stay at camping sites along with other Polish cyclists, at a few select sites.

Internet usage is very high among cyclists. This has been true for Polish cyclists for years, and during the last few years Internet usage has increased further in Poland, presumably among all age groups and cyclists and non-cyclists alike.

There is a stated interest among Polish cycling tourists to explore new grounds. If this also extends to being willing to pay for multiple ferry tickets is another question.

Experience with GPS among Polish cycling tourists is limited. Experience with the Internet is great, though, so a new mobile service should use the Internet as foundation, allowing the online users to gradually become increasingly familiar with electronic routing services.

Most cycling tourists want to have a map in their hands, not least if the mobile device runs out of battery, when on the road, or when staying overnight in nature or at a primitive camping site without any possibility of recharging.

GPS is becoming increasingly used and discussed among frontrunners such as ADFC, cf. Die ADFC-Radreiseanalyse 2009.

Apart from the domestic market, in each of the participating countries, the Polish cycling holiday market is also important for Bornholm at the moment, and some Polish cyclist will cycle in Poland via Bornholm and on to Scania.

The German cycling holiday market is the largest in Europe, and cycling is currently very popular among Germans visiting Bornholm. – Of course there would also be some German cycling enthusiast, who would try to cycle in two or three foreign countries in one summer holiday.

The Polish cycling tourists on Bornholm almost exclusively use mountain bikes. Among German ADFC-members, as many as 25% of mountainbike users had used a GPS devise during a cycling holiday, whereas the percentage was around 10% for owners of other types of bicycles (Trendscope 2008, according to Die ADFC-Radreiseanalyse 2009).

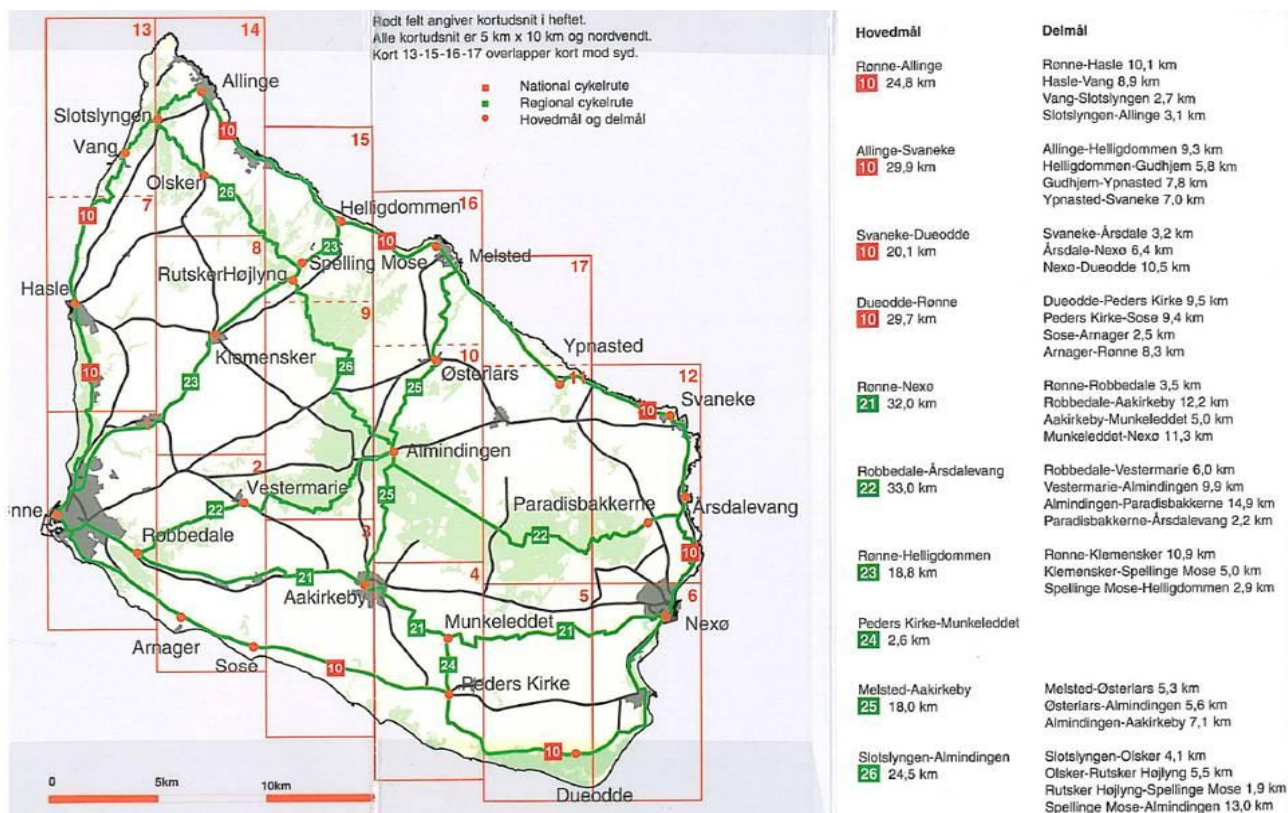
The percentage of Polish cycling holiday-makers who already has used a GPS device is very low, and the interest in using a GPS devise on the next holiday is low among Polish cycling holiday-makers.

It is thus likely, that a GPS service will have a better chance among German or Swedish cycling holiday-makers than among the Polish, for the time being.

Table 113 Five markets for three cycling tourism destinations -individually and jointly

	Northern Poland	Bornholm	Scania	Three destinations
Local residents	1	5	1	1 Koszalin
Poland	2	3	5	2
Germany	3	2	3	3
Denmark	4	1	4	5
Sweden	5	4	2	4
Absolute split	1	2	3	4
	Northern Poland	Bornholm	Scania	Three destinations
Local residents	71%	25%	40%	see below
Poland	25%	10%	2%	70%
Germany	3%	20%	5%	25%
Denmark	1%	40%	3%	3%
Sweden	0%	5%	50%	2%
Total	100%	100%	100%	100%
Absolute split, est.	40%	30%	20%	10%

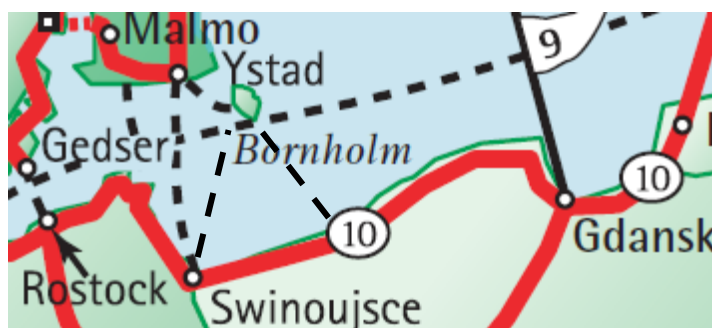
Figure 37 A cycle route - number 10 - around Bornholm, and 6 routes during the interior of Bornholm



Source: Cykelveje på Bornholm, Bornholms Regionskommune, 2005.

The length of route 10 around the island is 105 km, and the 6 cross-country routes are about 120 km in total. So, there are about 225 km of cycle trails on Bornholm.

Figure 38 A cycle route – number 10 - in Scania and in Northern Poland



Source: European Cyclists Federation, Eurovelo, the European cycle route network, www.ecf.com.

Note: The two dotted lines in the southern direction has been added.

The wonderful bicycle island Bornholm – with its already existing cycle-route number 10 - should be part of the Eurovelo route number 10.

An interactive bicycle website with a possibility to download bicycle routes in pdf and print a hard copy as well as on GPS could emulate the following decision process:

1. Which country do you come from? – What is your home city / postal code?
2. Which of the following destinations do you want to include on your cycle holiday? Koszalin region, Bornholm, Scania
3. How are you getting from your home town to where you start cycling, or from where you will catch the ferry? – By car. By train (or bus). By cycle all the way from home.
4. If you go to Bornholm, will you bring your car?
5. By which ferry route will you go from Poland to Bornholm?
6. How many nights will you spend in your chosen cycle destination(s)?
7. Will you stay all nights at the same place of accommodation or will you generally spend only one night at each accommodation?
8. Which of the following types of accommodation will you use? Holiday cottage, camping, hotel/pension, holiday centre, youth hostel(s). Tanie pola namiotowe.
9. If you will stay (for a full week) at one holiday centre, which of the following parts of Bornholm do you intend to book your chosen type of accommodation: Holiday centres: Hasle, Allinge, Other. –
10. If you will stay (for a full week) in a holiday cottages: Dueodde-Balka, Sømarken-Boderne, Rønne-Hasle, Allinge-Gudhjem, Nexø-Svaneke.
11. If you will stay at youth hostels on Bornholm, which of the following hostels will you use: Svaneke, Gudhjem, Sandvig, Hasle, Rønne, Boderne. – Dueodde camp/hostel
12. If you will stay at camping sites, which of the following camping sites will you use?
13. If you will stay at hotels, in which of the following areas will you stay (1, 2, 3, 4, 7 nights).
14. By which route will you leave Bornholm? – Same as arrival. – Other.
15. Will you stay overnight in Kolobrzeg before departure to Bornholm? (If yes: Camping, hotel, B&B)
16. Will you stay overnight in Kolobrzeg when returning from Bornholm? (If yes: Camping, hotel, B&B)
17. Will you stay overnight in Mielno? (If yes: Camping, hotel, B&B)

18. Will you stay overnight along the cycle route south-east of Koszalin? – If yes, for how many nights? – If yes: Camping, B&B, Farm houses ...
19. By which route will you get to Scania: Rønne-Ystad, Sassnitz-Trelleborg, Rostock-Trelleborg, Swinoujcie-Ystad, Allinge-Simrishamn, airplane to Malmö.
20. If you will visit Scania, how many nights will you stay? – Day visit only, one night, two nights, three nights ..
21. If you will stay overnight in Scania, which type of accommodation will you use?
Campingsites, camp on the beach / green field / wood, hotel, B&B, Farm house.

The above questions are quite similar to the ones which were run in the offline survey as well as the online survey using SPSS Dimensionet. Potentially, the same tool or a similar one could be used to develop an online recommendation system. The output could be an automatically generated pdf-file, a taylor made brochure, which take into account the preferences of the individual cyclists, as reflected in the individual answers to the above questions. A low tech version could be a middle of the road recommendation, depending on desired countries, and selected languages. – A German recommendation would have a number of defaults, such as accommodation in holiday cottages for a week on Bornholm, with or without a car. – A Polish variant could have a choice between traditional camping sites and primitive camping sites on Bornholm, and traditional camping sites or camping in nature in Scania, South Sweden, and traditional camping sites in Poland. “Tanie pola namiotowe”, and its equivalent in other languages, should definitely only be mentioned in Polish, if at all, in order not to cannibalise other types of accommodation currently preferred by Danes, Germans and Swedes and others on Bornholm and in Scania. An upmarket Polish variant could entail holiday centre accommodation. – A Swedish and English variant could entail hotels, pensions or B&B as the default type of accommodation at all destinations. – A Danish variant could entail the use of youth hostels or holiday centres as default, with traditional camping sites as an alternative. – The varying types of accommodation takes into account the typical preferences of the different nationalities.

Although most holiday cyclists use their own cycle, one could imagine rented bicycles with a GPS as an additional possibility. This could also be offered for packaged bicycle tours. From a website there should be the possibility of downloading a pdf-file for Poland, for Bornholm, for Scania, and a combined one. Ideally, it should be possible to make individualised cycling brochures in pdf, with the possibility to download the routes – general or preferably individualised – to a GPS devise.

The Swedish currency is relatively weak at the moment, 12% down against the Euro in the first eight months of 2009 compared to the average of all 12 months of 2008, and the Polish currency, PLN, zloty, is down 21%. This is of course making it cheaper for Germans and other foreigners to visit Sweden and Poland, which is an opportunity for attracting additional foreign cyclists.

A holiday for Polish cyclists is typically 7 nights, not including excursionists, who don't spend any nights. This is about 7 times 24 hours (6 full days plus about two half days). There is up to one day without cycling, which leaves 6 cycle days. The poles will cycle 50 km per cycle day, generally. This gives an typical length of a cycle holiday of 300 km, or just under. On Bornholm poles and others will perhaps cycle 40 km per day. With up to 6 cycle days, that gives a cycle holiday on Bornholm of 240 km. – This can be reduced to say 200 km. – If adding 100 km in Poland or in Sweden, the cycle holiday is full, 300 km. The tourist themselves will decide if they will cycle in one, two or three countries during a single cycle holiday. As is the case with the North Sea Cycle Route, the cyclists on the Baltic Sea Cycle Route, yet to be named, but possibly it will be Bike the Baltic, may decide to cycle mainly in one of the three destination one year, and then perhaps another one next year. Some energetic cyclists may do three countries, and 150 km in each, which makes 450 km. This would require 9 cycle days, plus one day without cycling. All in all, this would be an 11 day or so cycle holiday. There are very few Polish cyclists (maybe 3%) who would take a cycle holiday of 10 nights or more. Some German cycle enthusiasts may be quite keen to take an 11 day cycle holiday involving three foreign countries, plus possibly the home country.

A tri-nation tour, with alternating places of accommodation could be as follows:

2 nights in Poland, if Mielno and Koszalin county is chosen by the cyclists, otherwise just one night in Kolobrzeg, if the cyclists choose this.

4 nights on Bornholm, initially.

2 nights in Scania, South-Western Sweden, if the cyclists choose this

2 nights on Bornholm, on the return journey, if the cyclists choose this

1 night i Kolobrzeg, on the return journey, if the cyclists choose this

11 nighs in total.

A cycle holiday on Bornholm can easily be 6 nights with alternating accommodations (camping or youth hostels), or 7 nights in holiday cottages or at holiday centres. In Poland and in Sweden tours of a week or more can of course also be designed. But do cycle the tri-nation tour: Bike the Baltic.

8 Summary

Cycling in Poland, specifically around Koszalin and Kolobrzeg: Since Koszalin is a major city with 100.000 inhabitants the local population will be the largest user group of the cycle trails around Koszalin. The next largest target group will be visitors from the rest of Poland. The cycle trail from Koszalin to Mielno and along the coast from Mielno to Kolobrzeg is well known. As far as the cycle trails around Koszalin is concerned there is a need to make cyclists from other parts of Poland aware of these. Thirdly, among foreign potential cyclists Germany will be by far the largest market. Swedes and Danes do not count much in the bednight statistics in Poland, and very few Swedish and Danish cyclists are likely to show up in Kolobrzeg and on the cycle trails to Mielno and Koszalin. Kolobrzeg is a stronghold for German tourists in Poland, but they primarily come for the wellness treatments, and the current German visitors to Kolobrzeg are unlikely to cycle much. So, a new group of relatively young and active could possibly be attracted in larger numbers, the cycle enthusiasts with a interest in history and nature.

Cycling on Bornholm: Polish tourists constitute a relatively large part of the “true cycling holiday-makers”, i.e. those who cycle (almost) every day during the cycle holiday, and move between accommodations. Those who sail to Bornholm from Kolobrzeg have travelled relatively far to get to the ferry, some 400 km in average. Since the ferry leaves in the morning and is back in Kolobrzeg late in the evening, at least a third of visitors stay overnight in Kolobrzeg or nearby. There is only one camping site in the city, and many hotels and B&B's. There is only a couple of km from the camping site or any of the hotels to the ferry. Largely all the Polish cycling tourists on Bornholm use the Internet every week, possibly every day, and largely all of them will seek information on the Internet ahead of a cycle holiday. The ferry from Kolobrzeg sail every day in the high season, and several times a week during the rest of the season. The high season for Polish cycle tourists on Bornholm is August, with July as the second busiest month. Unlike other nationalities, there is a rather great usage of primitive camping among Polish cycling tourist on Bornholm. There is a quite great interest among Polish cycling tourist in GPS cycle route descriptions, although it will probably be a must for them to have a hard copy map with them, which may be printed from the Internet, though. Mobile phones (with GPS) and separate GPS devices may run out of battery when cycling, or at primitive camping sites with no easy possibilities of re-charging. Those Danish cycling tourists on Bornholm who move between accommodations are likely to want to stay at ordinary camping sites, at youth hostels. Those Danes and Germans who stay at a single place throughout their stay on Bornholm are likely to stay at holiday cottages or holiday centres. Germans have a long

tradition for staying in holiday cottages when visiting Bornholm and Denmark in general. Both the cycling pattern, cycling intensity and type of accommodation will then be different for German than for Polish cyclists on Bornholm. Those Polish cycling tourists who have a car, which is two thirds of them, have more experience with GPS devices than other Polish cycling tourists. Since most German tourists on Bornholm even bring their car with them to Bornholm they are probably relatively well experienced in using GPS devices. It is likely, that the German visitors, perhaps the younger ones, who have not been to Bornholm before, or only visited the island a few times, may appreciate the possibility of getting cycle routes onto a GPS device.

Cycling in Scania: The big cycle event in the beginning of September each year, Christianslöppe, from Helsingborg to Malmö, would lend itself well for GPS-routing. Likewise, the corresponding cycle event on Bornholm, Bornholm rundt, is popular on GPS. Those who have cycle routes like this on their GPS could be early users of cycle-routes on GPS in the nearby region in the South Western corner of Scania. In Sweden as well as in Poland and in Germany train plays a rather big role as a means of transport to the place where the cycling begins. The majority of cycle tourists in Scania and elsewhere in Sweden will be Swedes. Some Polish cyclists would like to cycle in Scania. However, since this is relatively unknown territory routes on GPS would be welcome among those Poles who have a GPS device, and who have tried to download GPS files. But as for other cycle destinations, it is a must to have the cycle routes or a map in hard copy, at least printable from a website. Cycle tourists travel a little shorter than other tourists to get to their destination. Invariably, the relative close destinations are preferred to distant destinations. Therefore, also since Sweden covers is large area, cycle tourists in Scania are likely to be Swedes mainly from the southern half of the country. Invariably, cycle tourists in Scania – from Sweden, Germany, Poland and Denmark will be Internet users, and they will expect to find all the information they require for their cycle holiday on the Internet.

Cycling in Poland and on Bornholm: Those who would cycle both in Poland and on Bornholm would be Poles, not Danes. Although Polish cyclist do know English and/or Germany, it would be important to have information about both the Polish routes and guidelines about how to get to the ferry and how to get accommodation in or near Kolobrzeg in Polish language. Whether primitive camping should be mentioned in the literature is an open question, but it should not be mentioned in any other languages. Those who will cycle around Koszalin and those who will cycle on Bornholm are possibly not the same persons to any great extent. The first and primary users of the cycle tracks around Koszalin will be local residents. There will be great opportunities for these to test the GPS routing system.

Cycling in Poland and in Scania: There will hardly be a large group of cycling tourists who would cycle in both Poland and Scania (without cycling on Bornholm). The ship routes from Poland to south western Sweden go from Swinoujcie to Ystad. Further east there is a route from Gdynia to Karlskrona, where a push is also being made to attract Polish cycle tourists. Although there are low cost airline routes from Poland to Malmö, the costs of checking in bicycles on the plane would probably deter most cyclist to go by air.

Cycling in Scania and on Bornholm: This would be something for primarily Swedes, secondarily Danes. Also, some Poles would start their cycling route only on Bornholm, then continue by one of the routes to Scania, most likely Rønne-Ystad. Finally, Germans may start and finish on Rügen, where they may leave their car or go there by train, then go to Bornholm and then Scania, before returning to Rügen.

Cycling in Poland, on Bornholm and in Sweden: Those who would cycle in all three countries, Poland, Bornholm (DK) and Scania (Southern Sweden) would primarily be Poles, secondarily a few Germans. Very few Danes and Swedes are likely to go for the tri-nation route. The primary languages for the tri-nation route would thus be Polish, German and English. The German specialist cycle tour operators may at some stage a tour Berlin – Stettin – Usedom - Kolberg – Koszalin county – Bornholm – Scania – Rügen – Usedom. But the market for bicycle package tours is limited, and for three or four nation tours the market would be even more limited. There is, however, nothing to prevent adventurers from making their own three or four nation cycle holiday, involving Northern Poland, Bornholm, and Scania. – And if the tour starts in Germany, bits of Germany such as Usedom and/or Rügen may also be involved as part of the cycle trip.

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Appendix

Cycling links

With respect to cycling on Bornholm, Polish readers may find info here:

www.bornholm.info/dbupl/Cykelbrochure_PLweb.pdf

Swedish readers may find info about cycling on Bornholm here:

http://www.bornholm.info/dbupl/Cykelbrochure_Sweb.pdf

And for the bicycle brochure about Bornholm, in English:

<http://viewer.zmags.com/publication/f43dbcaf#/f43dbcaf/1>

And: www.cykel.bornholm.info/?langid=2

Bicycle brochure about Bornholm, In German:

<http://viewer.zmags.com/publication/d49fb0bd#/d49fb0bd/1>

And: www.cykel.bornholm.info/?langid=3

Bicycle brochure about Bornholm, in Danish:

<http://viewer.zmags.com/publication/e9eadc6a#/e9eadc6a/1>

And: www.cykel.bornholm.info/

Eurobike, Friedrichshafen, 2-5 Sept. 2009, Germany: www.eurobike-show.de/eb/?lg=en

Ferry-lines:

- Kołobrzaska Zegluga Pasazerska (Kolobrzeg-Nexø): www.kzp.man.pl
- Zegluga Gdanska (Ustka/Darlowo-Nexø): www.zegluga.pl
- Polferries (Świnoujście-Rønne and more): www.polferries.pl
- BornholmsTrafikken (Rønne-Ystad, Sassnitz, Køge): www.bornholmstrafikken.dk
- Christiansøfarten (Allinge-Simrishamn): www.bornholmexpress.dk

GPS-links:

- GPSies - Tracks for vagabonds: www.gpsies.com
- www.gps-tour.info
- www.motionbased.com (→ Garmin Connect)
- www.garmin.com
- www.radwege-online.de

Treasurehunt by GPS on bicycle – Rent a GPS:

<http://www.masterpiece.dk/UploadetFiles/12000/1/Pedal.pdf>

In English: <http://www.e-pages.dk/visitdenmark/223/11> p. 11.

GPS- Walks: Try something new. Rent a GPS and get an individually guided tour of the inner city.
www.visitkolding.dk/NR/rdonlyres/AD49E13D-1A5F-40EA-A1AD-BC0784F28909/0/koldingturistkalender2008low.pdf

Some selected train schedules to Kolobrzeg and more



Query page

Connection: from BERLIN to Kolobrzeg, weitere Angaben: carriage of bicycles required

Selection single ride

Station/Stop	Date	Time	Platform	Products
Berlin Hbf (tief)	Fr, 28.08.09	dep 17:28	2	IC 145 Intercity
Szczecin Glowny	Fr, 28.08.09	arr 19:35		VBB single, collective and season tickets are recognised, Bicycles conveyed - subject to reservation, Number of bicycles conveyed limited, Please reserve, SnackPoint/Snacks on board the train
Szczecin Glowny	Fr, 28.08.09	dep 19:43		88828 Zug
Kolobrzeg	Fr, 28.08.09	arr 22:14		88829 Number of bicycles conveyed limited, 2nd class only, space for wheelchairs Runs as 88828 up to Szczecin Dabie, then as 88829, then as 88828

Duration: 4:46; runs Mo - Fr, Su, not 6. until 9. Nov 2009

Border crossing: Tantow(Gr)

Fares not available

1 adult, 2nd class



Query page

Connection: from WARSZAWA to Kolobrzeg, weitere Angaben: carriage of bicycles required

Selection single ride

Station/Stop	Date	Time	Platform	Products
Warszawa Zachodnia	Fr, 28.08.09	dep 09:05		D 28511 Schnellzug
Kolobrzeg	Fr, 28.08.09	arr 18:25		Number of bicycles conveyed limited

Duration: 9:20; runs not every day, 25. until 31. Aug 2009

Fares not available

1 adult, 2nd class



Query page

Connection: from WARSZAWA to Kolobrzeg, weitere Angaben: carriage of bicycles required

Selection single ride

Station/Stop	Date	Time	Platform	Products
Warszawa	Fr, 28.08.09	dep 09:05	D 28511	Schnellzug
Zachodnia				Number of bicycles
Kolobrzeg	Fr, 28.08.09	arr 18:25		conveyed limited

Duration: 9:20; runs not every day, 25. until 31. Aug 2009

Fares not available

Station/Stop	Date	Time	Platform	Products
Warszawa	Fr, 28.08.09	dep 14:35	EX	Express-Zug
Centralna			18411	Subject to compulsory reservation, Number of bicycles conveyed limited , Bar coach
Szczecin Dabie	Fr, 28.08.09	arr 19:44		
Szczecin Dabie	Fr, 28.08.09	dep 20:00	88829	Zug
Kolobrzeg	Fr, 28.08.09	arr 22:14	88828	Number of bicycles conveyed limited , 2nd class only. Runs as 88829 up to Goleniow, then as 88828

Duration: 7:39; runs not every day, 25. until 31. Aug 2009

Fares not available

1 adult, 2nd class



Query page

Connection: from KRAKOW to Kolobrzeg, weitere Angaben: carriage of bicycles required

Selection single ride

Station/Stop	Date	Time	Platform	Products
Krakow Glowny	Fr, 28.08.09	dep 05:47	D 38102	Schnellzug
Krzeszowice		dep 06:18	D 38103	Number of bicycles
Trzebinia		dep 06:34		conveyed limited,
Jaworzno Szczakowa		dep 06:55		Bar coach.
Myslowice		dep 07:14		Runs as D 38102 up
Katowice		dep 07:34		to Jaworzno
Zabrze		dep 07:56		Szczakowa, then

Gliwice	dep 08:07	as D 38103
Kedzierzyn Kozle	dep 08:39	
Opole Glowne	dep 09:21	
Brzeg	dep 09:50	
Olawa	dep 10:03	
Wroclaw Glowny	dep 10:40	
Wroclaw Mikołajow	dep 10:48	
Oborniki Slaskie	dep 11:08	
Zmigrod	dep 11:27	
Rawicz	dep 11:47	
Leszno	dep 12:12	
Koscian	dep 12:32	
Poznan Gl.	dep 13:22	
Oborniki Wlkp.	dep 13:58	
Rogozno Wlkp.	dep 14:13	
Chodzież	dep 14:44	
Pila Glowna	dep 15:15	
Jastrowie	dep 15:45	
Szczecinek	dep 16:16	
Bialogard	dep 17:10	
Kolobrzeg	Fr, 28.08.09 arr 17:40	

Duration: 11:53; runs daily

Fares not available

Station/Stop	Date	Time	Platform	Products
Krakow Glowny	Fr, 28.08.09	dep 10:00	EX	Express-Zug
Warszawa Zachodnia		dep 12:50	38414	Subject to
Warszawa Centralna		dep 13:00		compulsory
Warszawa Wschodnia		dep 13:15		reservation, Number
Dzialdowo		dep 15:57		of bicycles conveyed
Ilawa Glowna		dep 16:40		limited, Bar coach
Malbork		dep 17:26		
Tczew		dep 17:50		
Gdansk Glowny		dep 18:33		
Gdansk Wrzeszcz		dep 18:38		
Gdansk Oliwa		dep 18:43		
Sopot		dep 18:48		
Gdynia Glowna		dep 19:06		
Lebork		dep 20:01		
Slupsk		dep 21:00		
Slawno		dep 21:30		
Koszalin		dep 22:05		
Ustronie Morskie		dep 22:37		
Kolobrzeg	Fr, 28.08.09	arr 22:52		

Duration: 12:52; runs not every day, 25. until 30. Aug 2009

Fares not available

1 adult, 2nd class



Subject to compulsory reservation

Train from Hamburg, Berlin or Stettin (Szczecin) via Rostock/Stralsund to Lachen Sassnitz on Rügen. Then cycle to the ferry port in Mukran, to catch the ferry to Rønne, Bornholm



Station/Stop	Date	Time	Platform	Products
Hamburg Hbf	Sa, 12.09.09	dep 06:36	5a/b	RE 33005
Rostock Hbf	Sa, 12.09.09	arr 08:52	6	Regional-Express Number of bicycles conveyed limited.
Rostock Hbf	Sa, 12.09.09	dep 09:00	3	RE 33209
Sassnitz	Sa, 12.09.09	arr 10:55	1	Regional-Express Number of bicycles conveyed limited.

Duration: 4:19; runs daily, not 7., 8. Sep

Fare: from 37,00 EUR up to 42,60 EUR (Savings fares only limited available)



Station/Stop	Date	Time	Platform	Products
Berlin Hbf (tief)	Sa, 12.09.09	dep 06:34	6	RE 38346
Stralsund	Sa, 12.09.09	arr 09:44	2 a/b	Regional-Express Number of bicycles conveyed limited.
Stralsund	Sa, 12.09.09	dep 10:04	6 a/b	RE 33209
Sassnitz	Sa, 12.09.09	arr 10:55	1	Regional-Express Number of bicycles conveyed limited.

Duration: 4:21; runs daily, not 7., 8. Sep

Hint: Departure/Arrival replaced by an equivalent station

Fare: from 37,00 EUR up to 41,40 EUR (Savings fares only limited available)

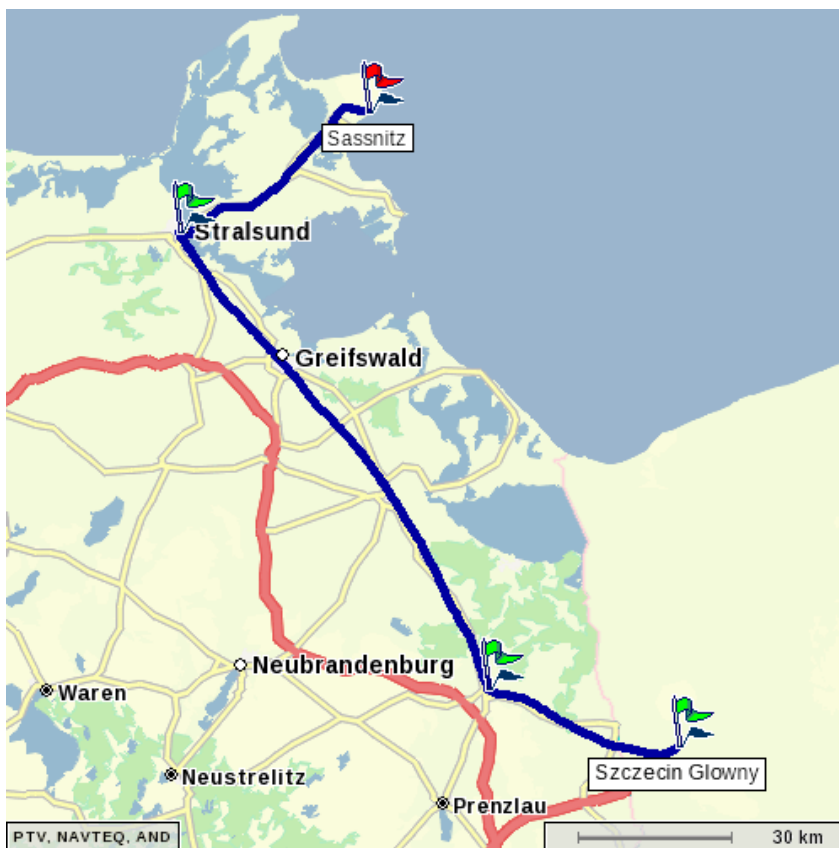


Source: Bahn.de



Station/Stop	Date	Time	Platform	Products
Szczecin Główny	Sa, 12.09.09	dep 06:54	RE 5302	Regional-Express Number of bicycles conveyed limited.
Pasewalk	Sa, 12.09.09	arr 07:33	4 a	
Pasewalk	Sa, 12.09.09	dep 08:21	1	RE 38346 Regional-Express Number of bicycles conveyed limited.
Stralsund	Sa, 12.09.09	arr 09:44	2 a/b	
Stralsund	Sa, 12.09.09	dep 10:04	6 a/b	RE 33209 Regional-Express Number of bicycles conveyed limited.
Sassnitz	Sa, 12.09.09	arr 10:55	1	

Duration: 4:01; runs daily, not 7., 8. Sep



Source: Bahn.de

Cyclists coming by train should actually get off the train one stop before Sassnitz, namely in **Lachen**. From Lachen to the ferry in Mukran there are 5 km, a trip which should take 21 minutes on bicycle.

Price (2009) for the ferry, BornholmsTrafikken.dk: 1 bicycle, including 1 adult, each way:
Low season 04.04 - 19.06 and 31.08 - 01.11 2009: ~EUR 25, each way.

Highseason 20.06 - 30.08: ~EUR 33, each way.

On certain days, there are ferry departures 12.15 from Sassnitz ferry port to Rønne, cf. www.bornholmstrafikken.dk. Check-in for cyclists and others finishes 11.45 for these departures. This means that there is 50 minutes from the train arrives in Sassnitz (or rather one stop before, in Lachen), Rügen, until check-in for the ferry closes in Mukran.

German holiday-makers on Bornholm traditionally prefer to stay in holiday cottages, and bring their car as well as bicycles. For a cycling holiday involving Bornholm this would entail a stay of 7 nights, at a single place, and then cycle in a star pattern in different directions on the cycle days. - Polish holiday-makers on Bornholm are also getting a taste for the stays on Bornholm in holiday cottages.