

Biking South Baltic: Bicycle survey results 2018

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The "Biking South Baltic!" project involves seven project partners, from Denmark (2), Germany (1), from Poland (3) and from Belgium (1) as well as ten associated partners: Pomorskie Tourist Board, Gdansk, Poland (Lead partner); Pomorskie Voivodeship, Gdansk, Poland; Zachodniopomorskie Voivodeship, Szczecin, Poland, European Cyclists' Federation, Brussels, Belgium; Mecklenburg-Vorpommern Tourism Board, Rostock, Germany; Centre for Regional and Tourism Research, Bornholm, Denmark; Danish Cycling Tourism, Copenhagen, Denmark.

Information about the "Biking South Baltic!" project can be found here:

<http://www.prot.gda.pl/biking-south-baltic>.



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General review of bicycle survey results

In total 2,285 questionnaires were filled in at five regions (provinces, destinations) in 3 different countries: Pomerania, Poland (506), West Pomerania, Poland (400), Mecklenburg-Vorpommern, Germany (322), Bornholm, Denmark (455) and southern parts of mainland Denmark (602). Furthermore 536 cyclists for daily mobility were encountered and counted in one of the five regions, Mecklenburg-Vorpommern in Germany, were 62% were daily utility cyclists, 38% leisure cyclists. In the remaining regions, surveys were undertaken in leisure and holiday areas. Only the leisure cyclists are commented upon in the following.

6% of responses were received in June, 24% in July, 36% in August, 20% in September and 14% in October – 2018. Across the five regions, two thirds of the leisure cyclists spent at least one night away from home. 33% did not spend any nights away from home. 18% spent 1-3 nights away, 26% spent 4-7 nights, 21% spent 8-14 nights, while only 2% spent 15 night or more away.

Table 1 Survey months - recreational cyclists in five regions of three countries

Month	Pomerania	West Pomerania	Mecklenburg-Vorpommern	Bornholm	DK South	Total	Total %
June	33	99	0	0	0	132	5,8%
July	1	151	0	199	205	556	24,3%
August	7	150	0	256	397	810	35,4%
September	465	0	2	0	0	467	20,4%
October	0	0	320	0	0	320	14,0%
Total	506	400	322	455	602	2285	100,0%
Total %	22%	18%	14%	20%	26%	100%	

Table 2 Nights spent by recreational cyclists in five regions of three countries

Nights	Pomerania	West Pomerania	Mecklenburg-Vorpommern	Bornholm	DK South	Total
Zero	60%	32%	24%	4%	36%	33%
1-3	31%	5%	13%	17%	18%	18%
4-7	8%	33%	37%	53%	13%	27%
8-14	1%	30%	22%	20%	33%	21%
15-..	0%	1%	4%	5%	0%	2%
Total	100%	100%	100%	100%	100%	100%
Average	1,24	5,28	6,43	6,70	3,69	4,40
Responses	505	400	322	434	578	2239

Table 3 Were nights spent at the same place each night? (nights >=2)

Q4 same place	Pomerania	West Pomerania	Mecklenburg-Vorpommern	Bornholm	DK South	Total
No	123	92	63	238	207	723
Yes	35	175	170	163	141	684
Total	158	267	233	401	348	1407
No, percent	78%	34%	27%	59%	59%	51%

Across the five regions, as many as 51% of those cyclists who spent at least two nights away, stayed at two or more different places overnight.

Table 4 Types of accommodation used by cyclists in five regions of three countries

Q5 accom type	Pomerania (PL)	PL: West Pomerania	Mecklenburg-Vorpommern	DK: Bornholm	DK South	Total
1 Hotel	9%	37%	32%	7%	8%	17%
2 Bed & breakfast	20%	11%	17%	9%	12%	13%
3 Private home (paid)	31%	33%	3%	4%	2%	12%
4 Private home (free, not own)	3%	0%	2%	2%	5%	3%
5 In own holiday cottage	0%		5%	0%	4%	2%
6 In rented holiday cottage	9%	4%	11%	19%	5%	10%
7 Camping, normal	20%	7%	9%	33%	33%	23%
8 Camping, primitive	2%	8%	3%	10%	11%	8%
9 Shelter				5%	4%	2%
10 At my permanent home	0%			0%	4%	1%
11 Holiday apartment (Fewo)	1%		14%	0%	1%	3%
12 Youth hostel			1%	4%	2%	2%
99 Other	3%		2%	5%	9%	5%
Total	100%	100%	100%	100%	100%	100%
Responses	205	271	244	418	371	1509
Commercial (1,2,3,6,7,11,12)	90,7%	91,5%	87,7%	77,5%	62,5%	79,8%
Mixed (8, 9, 99)	5,4%	8,1%	5,3%	19,9%	24,8%	14,6%
Non-commercial (4, 5, 10)	3,9%	0,4%	7,0%	2,6%	12,7%	5,6%
Total	100%	100%	100%	100%	100%	100,0%

Across the five regions 80% of the overnight cyclists used commercial accommodations. Normal camping sites and hotels were the two most frequently used types of accommodation across the five regions, accounting for 40% of the cyclists.

Stays at camping sites (normal or primitive) lasted 6.6 nights, hotels 7.3 nights, overall 6.9 nights, among those cyclists staying overnight. Stays at holiday apartments (Fewo, mostly in Germany) lasted 8.9 nights.

Table 5 Nights of stay per type of accommodation used by overnight cyclists

	Pomerania	West Pomerania	Mecklenburg-Vorpommern	Bornholm	DK South	Total
1 Hotel	3,3	8,2	8,2	6,5	4,9	7,3
2 Bed & breakfast	3,4	6,4	5,3	6,3	4,9	5,2
3 Private home (paid)	3,3	8,3	9,3	6,6	5,9	6,6
4 Private home (free, but not your	2,2		5,6	7,4	3,7	4,7
5 In own holiday cottage	2,0	9,0	20,3	16,0	7,8	12,9
6 In rented holiday cottage	6,5		10,3	8,2	7,7	8,4
7 Camping, normal	3,9	9,3	8,9	7,2	6,4	6,6
8 Camping, primitive	3,5	5,3	12,7	6,1	5,9	6,6
9 Shelter		7,6		5,8	6,3	6,0
10 At my permanent home	2,0			7,0	6,3	6,0
11 Holiday apartment (Fewo)	4,0		9,5	7,5	7,0	8,9
12 Youth hostel			8,0	8,5	5,6	7,8
99 Other	3,5		2,0	6,7	6,8	6,1
Total	3,6	7,8	8,8	7,1	6,1	6,9

Table 6 Average number of persons per type of accommodation used by overnight cyclists

	Pomerania	West Pomerania	Mecklenburg-Vorpommern	Bornholm	DK South	Total
1 Hotel	2,3	3,9	3,1	3,6	2,6	3,4
2 Bed & breakfast	3,9	4,9	2,4	3,0	2,2	3,2
3 Private home (paid)	2,1	5,0	1,6	3,8	3,3	3,8
4 Private home (free, but not your	2,5	3,0	1,8	7,0	1,6	3,0
5 In own holiday cottage	2,0		2,5	3,0	2,1	2,3
6 In rented holiday cottage	3,9	3,7	2,2	5,1	3,1	4,1
7 Camping, normal	2,7	3,9	1,9	4,4	2,8	3,4
8 Camping, primitive	2,0	5,0	1,7	5,5	2,6	4,1
9 Shelter				6,4	2,2	4,6
10 At my permanent home	2,0			2,0	1,6	1,6
11 Holiday apartment (Fewo)	8,0		2,9	2,0	1,7	3,0
12 Youth hostel			2,0	6,3	2,0	5,0
99 Other	3,2		1,5	9,1	2,6	4,7
Total	2,9	4,4	2,5	4,9	2,5	3,6

At accommodations, across the five regions, there were 3.6 persons per cycle group.

Only about 5% of the recreational cyclists regarded cycling as only a means of transport.

Table 7 Characterisation of the trip by overnight cyclists in five regions

Q6 trip type 1 2 3	Pomerania	West Pomerania	Mecklenburg-Vorpommern	Bornholm	DK South	Total
1 Cycling holiday (cycling is the main motivation of the holiday)	65%	39%	48%	62%	36%	49,4%
2 Cycling as one activity whilst on holiday	34%	60%	52%	33%	51%	45,4%
3 Cycling as a means of transport during the holidays (to go to shops etc.)	1%	1%		5%	13%	5,2%
Total, percent	100%	100%	100%	100%	100%	100%
Total, respondents	206	268	243	417	371	1505

Table 8 Transport mode used by recreational cyclists in five different regions

Q11 trans mode 1 6	Pomerania	West Pomerania	Mecklenburg-Vorpommern	Bornholm	DK South	Total
1 Car (including camper van etc.)	44,9%	56,8%	50,3%	12,0%	49,2%	42,5%
1,4 Car + Ship or ferry				6,4%		1,2%
2 Bus	1,4%		4,4%	2,3%	3,7%	2,3%
2,4 Bus + Ship or ferry				2,0%		0,4%
3 Train	27,3%	8,0%	23,6%	9,1%	9,0%	14,9%
3,4 Train + Ship or ferry				12,5%		2,4%
3,6 Train + Bicycle only				0,5%		0,1%
4 Ship or ferry	0,8%		0,6%	48,4%	5,5%	11,2%
4,6 Ship or ferry + bicycle only				0,9%		0,2%
5 Airplane	0,6%				1,2%	0,4%
6 Bicycle only	25,1%	35,3%	21,1%	5,9%	31,6%	24,3%
Total, percent	100,0%	100,0%	100,0%	100,0%	100,0%	100,0%
Total, respondents	499	400	318	440	602	2259

To get to the cycle area, car is the main mode of transport (42%). To cycle all the way without any other modes of transport is also common (24%). Train is used by a much higher percentage than bus (15% for train, 2% for bus). Ferry is used by at least 11%.

Table 9 Importance of the possibility of biking in the choice of destination

Q12 biking 1 4	Pomerania	West Pomerania	Mecklenburg-Vorpommern	Bornholm	DK South	Total
1 Not important	19,8%	15,1%	18,0%	5,0%	15,0%	14,6%
2 Not so important	30,9%	20,9%	81,4%	14,4%	24,9%	31,5%
3 Quite important	26,5%	22,1%		48,5%	29,4%	27,0%
4 Very important	22,8%	42,0%	0,6%	32,0%	30,7%	27,0%
Total, percent	100,0%	100,0%	100,0%	100,0%	100,0%	100,0%
3+4 Quite + very	49,3%	64,1%	0,6%	80,5%	60,1%	53,9%
Total, respondents	495	398	322	437	602	2254

Not including Mecklenburg-Vorpommern, in four of the five regions, the possibility of biking was either quite important or very important in the choice of destination for between about 50% to about 80% of the recreational cyclists (mostly holiday cyclists).

Table 10 Age distribution for recreational cyclists in Poland, Germany and Denmark

Q17 age	Pomerania	West Pomerania	Mecklenburg-Vorpommern	Bornholm	DK South	Total
(9)18-29	18%	16%	3%	19%	12%	14,1%
30-39	33%	18%	7%	23%	20%	21,3%
40-49	23%	30%	10%	22%	20%	21,3%
50-59	13%	22%	28%	19%	30%	22,4%
60-85	12%	15%	51%	16%	19%	20,8%
Total, %	100,0%	100,0%	100,0%	100,0%	100,0%	100,0%
Ave. age	41,9	44,8	58,2	43,0	47,2	46,4
Total, n	497	400	320	444	602	2263

Overall 56% of respondents were under 50, 44% 50 or over. The very high proportion of cyclists aged 60 or over can partly be explained by the fact that interviews were undertaken in October in Mecklenburg-Vorpommern in North Eastern of Germany.

Table 11 General cycle habits of cyclists from Poland, Germany and Denmark

Q21 cycl habits 1 5	Pomerania	West Pomerania	Mecklenburg-Vorpommern	Bornholm	DK South	Total
1 Only on holidays	12%	12%	2%	7%	2%	7%
2 Less than once a month	8%	4%	2%	8%	1%	5%
3 Several times per month	34%	27%	18%	26%	13%	23%
4 Several times per week	26%	24%	42%	29%	43%	33%
5 Every day (or almost)	20%	34%	35%	30%	42%	32%
Total, percent	100%	100%	100%	100%	100%	100%
3+4 Several weekly / daily	46%	58%	78%	59%	84%	65%
Total, respondents	498	400	322	441	602	2263

Just 7% of the recreational cyclists cycle only on holiday.

Table 12 Organisers of bicycle tours mentioned by cyclists in five regions of Poland, Germany and Denmark

Q27x_organizator_txt	Pomerania	West Pomerania	Mecklenburg-Vorpommern	Bornholm	DK South	Total
Horyzonty	0	0	0	15	0	15
Mecklenburger Radtour	0	0	4	6	2	12
Others	11	0	6	8	3	28
Mentioned	11	0	10	29	5	55
None mentioned	495	400	312	426	597	2230
Total	506	400	322	455	602	2285
Mentioned	2%	0%	3%	6%	1%	2%
None mentioned	98%	100%	97%	94%	99%	98%
Total	100%	100%	100%	100%	100%	100%

Horyzonty (horyzonty.pl/) includes Klub Podrozy Horyzonty (Warsaw) and Biuro Horyzonty (Krakow).¹ – Mecklenburger Radtour (mecklenburger-radtour.de/) is based in Stralsund and is a prominent organiser of bicycle and hiking tours in Germany, Denmark and beyond.²

Others:

Germany: Berr-Reisen³, ADFC, Die Landpartie, Kofahl-Reisen, Polster & Pohl (Leipzig).

Mentioned by cyclists in Denmark: Bornholmtours.com, Bornpol.dk, Adventura, Bikingpeople.de

Mentioned by cyclists in Poland: Kuoni (of Switzerland), TUI (of Germany)

¹ <https://www.horyzonty.pl/oferta/rowery/wycieczka-rowerowa-dania-bornholm>.

² https://www.mecklenburger-radtour.de/reisen/reise/detail/bornholm_und_ruegen.html,
<https://www.mecklenburger-radtour.de/radurlaub/ostsee-nordsee/ostseekueste.html>.

³ <https://kataloge.berr-reisen.de/Rad2019/webpaper.html>.

Table 13 Home country of recreational (same day + overnight) cyclists in five regions of Poland, Germany and Denmark

Home country	Pomerania	West Pomerania	Mecklenburg-Vorpommern	Bornholm	DK South	Total
Poland	382	336	0	237	1	956
Germany	37	53	310	137	104	641
Denmark	5	0	0	70	378	453
Other countries	82	11	12	11	119	235
Total	506	400	322	455	602	2285

Home country	Pomerania	West Pomerania	Mecklenburg-Vorpommern	Bornholm	DK South	Total
Poland	75%	84%	0%	52%	0%	42%
Germany	7%	13%	96%	30%	17%	28%
Denmark	1%	0%	0%	15%	63%	20%
Other countries	16%	3%	4%	2%	20%	10%
Total	100%	100%	100%	100%	100%	100%

Table 14 Home country of overnight cyclists in five regions of Poland, Germany and Denmark

Home country	Pomerania	West Pomerania	Mecklenburg-Vorpommern	Bornholm	DK South	Total
Poland	132	211	0	219	1	563
Germany	28	53	232	137	93	543
Denmark	2	0	0	69	191	262
Other countries	43	10	12	11	110	186
Total	205	274	244	436	395	1554

Home country	Pomerania	West Pomerania	Mecklenburg-Vorpommern	Bornholm	DK South	Total
Poland	64%	77%	0%	50%	0%	36%
Germany	14%	19%	95%	31%	24%	35%
Denmark	1%	0%	0%	16%	48%	17%
Other countries	21%	4%	5%	3%	28%	12%
Total	100%	100%	100%	100%	100%	100%

In West Pomerania and Pomerania as well as in mainland Denmark, Germany was the main foreign market accounting for 19%, 14% and 24%, respectively. On Bornholm, Polish cyclists accounted for 50% of the respondents in the survey, Germany 31%.

Across all five partner regions, apart from Poland, Germany and Denmark, cyclists came from Netherlands, Czech Republic, Sweden, Switzerland, France, Austria, Belgium and Norway. –

“Other countries” accounted for just 2,6% of cyclists in the five regions, and these minor source markets comprised USA, Belarus, Finland, Latvia, Lithuania, Slovakia, Hungary, Russia, Spain, UK, Australia, Portugal, Italy, Mexico and New Zealand.

Table 15 Top eleven home country of recreational (same day + overnight) cyclists in five regions of Poland, Germany and Denmark (percent)

Q28 country txt	Pomerania	West Pomerania	Mecklenburg-Vorpommern	Bornholm	DK South	Total
Poland	75,5%	84,0%	0,0%	52,1%	0,2%	42%
Germany	7,3%	13,3%	96,3%	30,1%	17,3%	28%
Denmark	1,0%	0,0%	0,0%	15,4%	62,8%	20%
Netherlands	0,4%	0,0%	0,6%	1,1%	7,6%	2,4%
Czech Republic	2,4%	2,5%	0,0%	0,2%	0,5%	1,1%
Sweden	2,4%	0,0%	0,6%	0,0%	1,8%	1,1%
Switzerland	1,0%	0,0%	0,6%	0,4%	1,7%	0,8%
France	0,0%	0,0%	0,0%	0,2%	2,3%	0,7%
Austria	1,8%	0,0%	0,0%	0,2%	0,5%	0,6%
Belgium	0,0%	0,0%	0,6%	0,0%	1,5%	0,5%
Norway	0,0%	0,3%	0,0%	0,0%	1,7%	0,5%
Other countries	8,3%	0,0%	1,2%	0,2%	2,2%	2,6%
Total, percent	100%	100%	100%	100%	100%	100%
Total responses	506	400	322	455	602	2285

Table 16 Home region of recreational (same day + overnight) cyclists from Poland, Germany and Denmark

Q29 Province	Pomerania	West Pomerania	Mecklenburg-Vorpommern	Bornholm	DK South	Total
1 Mecklenburg-Vorpommern	3	2	78	10	5	98
2 Hamburg	0	0	11	9	13	33
3 Schleswig-Holstein	4	2	19	19	29	73
4 Brandenburg	1	0	0	1	0	2
5 Berlin	10	15	40	31	11	107
6 Sachsen-Anhalt	1	6	7	1	0	15
7 Bremen	0	0	2	1	0	3
8 Niedersachsen	5	4	26	8	13	56
9 Sachsen	0	6	0	12	6	24
10 Thüringen	3	2	4	3	0	12
11 Nordrhein-Westfalen	4	10	44	14	9	81
12 Hessen	0	2	27	3	2	34
13 Rheinland-Pfalz	1	0	7	0	0	8
14 Bayern	3	0	28	3	7	41
15 Saarland	1	0	2	0	0	3
16 Baden-Württemberg	1	4	14	5	7	31
0 Warszawa	8	11	0	34	0	53
1 Olsztyn	22	4	0	3	0	29
2 Kielce	31	9	0	10	0	50
3 Kraków	27	22	0	21	0	70
4 Katowice	31	47	0	15	1	94
5 Wrocław	27	62	0	10	0	99
6 Poznan	41	52	0	29	0	122
7 Szczecin	44	93	0	49	0	186
8 Gdansk	116	15	0	33	0	164
9 Łódź	20	21	0	6	0	47
DK 1 Capital Region	0	0	0	33	43	76
DK 2 Sealand	0	0	0	21	136	157
DK 3 South Denmark	2	0	0	4	145	151
DK 4 Middle Jutland	0	0	0	4	44	48
DK 5 North Jutland	3	0	0	0	9	12
Total, 3 countries	409	389	309	392	480	1979
Other countries	82	11	12	11	119	235
Total, all countries	491	400	321	403	599	2214

Based on postal codes of most of the respondents, cyclists from Poland, Germany and Denmark visiting the five regions of the partners of the Biking South Baltic project have been split into home regions.

Across the five regions, in absolute numbers, the top three home states of Germany were Berlin, Mecklenburg-Vorpommern and Nordrhein-Westfalen. For cyclists coming from Poland, the top three home areas were Szczecin, Gdansk and Poznan. Cyclists from Denmark came mainly from Region Sealand and Region South Denmark (Funen and Southern Jutland).

Table 17 Percentages of visitors to each of five destinations from each of 16 states in Germany, and an index for attraction to each destination after adjusting for population

Q29 Province	Pomerania	West Pomerania	Mecklenburg-Vorpommern	Bornholm	DK South	Total	Population
1 Mecklenburg-Vorpommern	8%	4%	25%	8%	5%	16%	2%
2 Hamburg	0%	0%	4%	8%	13%	5%	2%
3 Schleswig-Holstein	11%	4%	6%	16%	28%	12%	3%
4 Brandenburg	3%	0%	0%	1%	0%	0%	3%
5 Berlin	27%	28%	13%	26%	11%	17%	4%
6 Sachsen-Anhalt	3%	11%	2%	1%	0%	2%	3%
7 Bremen	0%	0%	1%	1%	0%	0%	1%
8 Niedersachsen	14%	8%	8%	7%	13%	9%	10%
9 Sachsen	0%	11%	0%	10%	6%	4%	5%
10 Thüringen	8%	4%	1%	3%	0%	2%	3%
11 Nordrhein-Westfalen	11%	19%	14%	12%	9%	13%	22%
12 Hessen	0%	4%	9%	3%	2%	5%	8%
13 Rheinland-Pfalz	3%	0%	2%	0%	0%	1%	5%
14 Bayern	8%	0%	9%	3%	7%	7%	16%
15 Saarland	3%	0%	1%	0%	0%	0%	1%
16 Baden-Württemberg	3%	8%	5%	4%	7%	5%	13%
Total	100%	100%	100%	100%	100%	100%	100%
Respondents and pop.	37	53	309	120	102	621	82.8 mio.

Q29 Index for visiting cyclists from 16 states to five destinations	Pomerania	West Pomerania	Mecklenburg-Vorpommern	Bornholm	DK South	Total
1 Mecklenburg-Vorpommern	417	194	1297	428	252	811
2 Hamburg	0	0	161	339	576	240
3 Schleswig-Holstein	310	108	176	454	815	337
4 Brandenburg	89	0	0	28	0	11
5 Berlin	619	648	297	592	247	395
6 Sachsen-Anhalt	101	422	84	31	0	90
7 Bremen	0	0	79	101	0	59
8 Niedersachsen	141	78	87	69	133	94
9 Sachsen	0	230	0	203	119	78
10 Thüringen	312	145	50	96	0	74
11 Nordrhein-Westfalen	50	87	66	54	41	60
12 Hessen	0	50	116	33	26	73
13 Rheinland-Pfalz	55	0	46	0	0	26
14 Bayern	52	0	58	16	44	42
15 Saarland	225	0	54	0	0	40
16 Baden-Württemberg	20	57	34	31	52	37
Total	100	100	100	100	100	100

The index for attraction of cyclists is percentage of visitors to each destination from each of the given origin (home) areas, here states in Germany, divided by the percent of population that each home area accounts for * 100. – This is a general formula or approach, which can be applied beyond Germany, and beyond cycling. – Across the five destinations, cyclists from

Mecklenburg-Vorpommern is clearly most drawn to their home area (state, Bundesland) followed by Bornholm and Pomerania. As far as Germany as a source market is concerned, also Berlin, Schleswig-Holstein, and Hamburg as home areas generate relatively many cyclists to five regions of this study, as indicated by the index for attraction, across the five destination regions.

Table 18 Any nights? Number of nights? Staying same place each night? - Cyclists visiting five regions in Poland, Germany and Denmark

Partner	n	Q2 any nights 1 0	Q3 nights	Q3 nights >= 1	Q4 same place 1 0
Pomerania (P2)	506	40%	1,24	3,08	22%
West Pomerania (P3)	400	69%	5,28	7,70	66%
Mecklenburg-Vorpommern	322	76%	6,43	8,49	73%
Bornholm (P6)	455	96%	6,70	7,00	41%
DK South (P7)	602	66%	3,69	5,75	41%
Total	2285	68%	4,40	6,53	49%
			>=0 nights	>=1 night	>=2 nights

68% spent at least one night away. Including same day cyclists (no overnights) the average number of nights spent away was 4.4 nights. – For those cyclists who spent at least one night away spent about 6.5 nights. Among those who spent at least two nights away, 49% stayed the same place all nights. This also means that as many as 51% of respondents in this survey stayed at different places during their (cycling) holiday.

Table 19 Hours and distance cycled. Importance of cycling. Starting or finishing cycle tour at home - Cyclists visiting five regions in Poland, Germany and Denmark

Partner	Q9 hours	Q10 km	Q12 biking 1 4	Q13 start not home	Q14 end not home
Pomerania (P2)	5,29	39,0	2,5	78%	87%
West Pomerania (P3)	4,79	38,6	2,9	66%	69%
Mecklenburg-Vorpommern	4,30	42,3	1,8	82%	83%
Bornholm (P6)	5,27	42,7	3,1	55%	25%
DK South (P7)	3,88	27,1	2,8	62%	62%
Total	4,69	36,9	2,7	68%	65%

In average, across the five cycle regions, excursionists and holidaymakers spent about 4 hours and 40 minutes on their cycling tour per day, cycling about 37 km. Cycling was close to being “quite important, and a main factor in the decision to come here”, 3 on a scale from 1 to 4.

Table 20 Size of cycle group. Average age. Children. Bicycle rental. Electric bikes. Cycle habits. - Cyclists visiting five regions in Poland, Germany and Denmark

Partner	Q16 group	Q17 age	Q18 num 0 14	Q19 rented 1 0	Q20 electric	Q21 cycle habits 1 5
Pomerania (P2)	2,6	41,9	0,3	25%	7%	3,3
West Pomerania (P3)	4,0	44,8	0,3	33%	9%	3,7
Mecklenburg-Vorpommern	2,4	58,2	0,0	16%	39%	4,1
Bornholm (P6)	4,8	43,0	0,8	10%	16%	3,7
DK South (P7)	2,4	47,2	0,3	7%	19%	4,2
Total	3,2	46,4	0,4	17%	17%	3,8

The average group size was 3.2. Average age of respondents (adults) was 46.4 year. In average, there were 0.4 child up to 14 years of age in each group. In 17% of the travel groups, at least one person had rented the bicycle used to this tour. 17% used electric bicycles. On a scale from 1 to 5 cycle habits averaged 3.8, i.e. close to 4, which means, "cycling several times a week".

Table 21 Importance of 12 different aspects of cycling – according to cyclists visiting five regions in Poland, Germany and Denmark

Partner	Q22 7 imp natural	Q22 8 imp transp	Q22 9 imp rental	Q22 10 imp route	Q22 11 imp safe lock	Q22 12 imp organize
Pomerania (P2)	4,4	3,2	2,5	3,1	3,5	2,5
West Pomerania (P3)	4,2	3,7	3,3	3,8	4,2	3,3
Mecklenburg-Vorpommern	4,7	2,7	1,7	2,9	4,1	1,7
Bornholm (P6)	4,4	3,4	2,2	3,3	3,8	2,4
DK South (P7)	4,3	2,7	1,8	3,3	3,0	1,9
Total	4,4	3,1	2,3	3,3	3,6	2,4

Partner	Q22 1 imp surface	Q22 2 imp signs	Q22 3 imp food	Q22 4 imp accom	Q22 5 imp wellness	Q22 6 imp cultural
Pomerania (P2)	4,0	3,7	3,1	2,8	3,7	3,7
West Pomerania (P3)	4,0	4,1	3,5	3,6	4,0	3,7
Mecklenburg-Vorpommern	4,3	4,3	3,1	3,3	1,5	3,2
Bornholm (P6)	3,7	3,9	3,3	3,5	2,9	3,5
DK South (P7)	3,8	3,7	3,1	2,6	1,6	3,1
Total	3,9	3,9	3,2	3,1	2,7	3,4

Note: n=2255 for all. Max=5. Min. and non-response=1.

Overall, the most important aspects of the cycling destinations was “natural scenery” followed by “surface” and “signs”. That is the case for all five destinations.

Table 22 Satisfaction with (or performance of) 12 different aspects of cycling – according to cyclists visiting five regions in Poland, Germany and Denmark

Partner	Q23 1 satisfac surface	Q23 2 satisfac signs	Q23 3 satisfac food	Q23 4 satisfac accom	Q23 5 satisfac wellness	Q23 6 satisfac cultural
Pomerania (P2)	3,5	3,1	3,2	3,2	3,7	3,7
West Pomerania (P3)	3,8	3,8	3,6	3,8	4,1	3,6
Mecklenburg-Vorpommern	3,8	3,7	3,7	4,1	2,6	3,8
Bornholm (P6)	4,1	4,0	3,8	4,0	3,8	4,0
DK South (P7)	3,9	3,9	3,6	3,4	2,3	3,5
Total	3,8	3,7	3,5	3,6	3,5	3,7
Responses	2201	2160	2072	1882	1534	2012
Responses % of 2201	100%	98%	94%	86%	70%	91%

Partner	Q23 7 satisfac natural	Q23 8 satisfac transp	Q23 9 satisfac rental	Q23 10 satis route	Q23 11 satis safe lock	Q23 12 satis organize	Q24 recom- mend 1 5
Pomerania (P2)	4,5	3,4	3,0	3,3	3,3	2,9	3,7
West Pomerania (P3)	4,5	3,7	3,5	3,7	3,9	3,4	4,3
Mecklenburg-Vorpommern	4,8	3,8	3,0	3,1	3,8	2,1	4,6
Bornholm (P6)	4,6	3,8	3,2	3,8	3,9	3,3	4,6
DK South (P7)	4,4	3,2	2,4	3,5	3,3	2,4	4,5
Total	4,5	3,6	3,1	3,5	3,6	3,0	4,3
Responses	2170	1777	1496	1866	1917	1476	2241
Responses % of 2201	99%	81%	68%	85%	87%	67%	

Satisfaction correlates with importance, i.e. respondents are most satisfied with the most important aspects. – In general, if something is very important, but satisfaction is moderate or relatively low, then the destination should try to improve this aspect. If both importance and satisfaction is high, the destination should “continue its good work”. If satisfaction is high, but importance relatively low its “possible overkill” (possibly overemphasized by the destination). Finally, if both importance and satisfaction is relatively low that aspect is “low priority”.

The low response rate for “options for organized bike tours”, “bicycle rental” and “wellness” indicates that relatively few of the respondents are interested in these aspects, which was also reflected in the low importance score of these aspects.

On a scale from 1 to 5 with 5 as maximum and 1 minimum, the average score regarding willingness to recommend the destination to other was 4.3.

Table 23 Usage of eight different information sources – according to cyclists visiting five regions in Poland, Germany and Denmark

Partner	Q26 1 Internet 0 1	Q26 2 book 0 1	Q26 3 brochure 0 1	Q26 4 office 0 1	Q26 5 map 0 1	Q26 6 prior know 0	Q26 7 family friends	Q26 8 other info 0 1	Q26 sum of sources
Pomerania (P2)	62%	35%	5%	3%	8%	26%	43%	21%	1,98
West Pomerania (P3)	61%	6%	4%	2%	17%	12%	26%	2%	1,29
Mecklenburg-Vorpommern	43%	16%	14%	8%	43%	41%	20%	7%	1,91
Bornholm (P6)	70%	30%	25%	10%	35%	22%	41%	5%	2,16
DK South (P7)	45%	17%	19%	19%	23%	45%	19%	4%	1,89
Total	56%	21%	14%	9%	24%	30%	30%	8%	1,86

In average, 1.86 (i.e. close to two) information sources was used by cycle tourists and cycle excursionists. Internet was the main source of information (used by 56% in relation to the cycle trip) followed by prior knowledge and family/friends (both 30%). – Maps were use by 24%, guide book by 21%.

Table 24 Organized tours, percentage domestic cyclists, other country mentioning, gender and income level on local scales – according to cyclists visiting five regions in Poland, Germany and Denmark

Partner	Q27 organize ½ 0 1	Q28 domestic 1 0	Q30 other coun ½	Q31 gender: Men %	Q32 income 1 5
Pomerania (P2)	2,3%	75%	49%	49%	4,27
West Pomerania (P3)	0,0%	84%	44%	55%	4,22
Mecklenburg-Vorpommern	3,6%	96%	76%	48%	3,64
Bornholm (P6)	10,5%	16%	77%	56%	3,75
DK South (P7)	2,2%	63%	59%	63%	3,31
Total	3,6%	65%	60%	55%	3,82
Responses	2228	2285	2228	2228	1559
Response rate	98%	100%	98%	98%	68%

Overall, just 3.6% of cyclists used a tour operator to organize their bike trip. On the other hand, more than 96% organized their trip individually (themselves).

Table 25 Spending per night by overnight cyclists and spending per day by one-day excursionists – according to cyclists visiting five regions in Poland, Germany and Denmark

Q5 accom type 1 11 - Overnight	Q8 1 EUR accom	Q8 2 EUR food	Q8 3 EUR activi	Q8 4 EUR local	Q8 5 EUR rental	Q8 6 EUR transport	Q8 7 EUR other	Q8 8 EUR total	Q2 any nights 0 1	Q3 nights	Q16 group	N: Resp.
1 Hotel	52,60	26,80	6,27	3,26	1,79	3,43	1,75	95,90	100%	6,95	3,29	243
2 Bed & breakfast	35,77	22,66	5,68	3,43	1,36	4,38	3,14	76,42	100%	4,81	3,11	179
3 Private home (paid)	20,71	15,23	4,17	3,23	1,31	3,77	2,86	51,27	100%	6,10	3,61	173
4 Private home (free)	0,00	17,19	7,07	6,49	0,58	2,72	9,17	43,22	100%	3,70	2,86	36
5 In own holiday cott	0,00	18,35	3,07	3,00	0,00	0,46	3,09	27,98	100%	12,79	2,24	29
6 In rented holiday co	33,56	18,73	6,91	3,40	1,14	4,15	3,37	71,25	100%	8,23	3,70	134
7 Camping, normal	23,74	20,41	6,37	5,27	0,89	5,92	4,16	66,76	100%	6,51	3,27	303
8 Camping, primitive	7,69	18,51	5,22	3,91	2,01	5,61	3,11	46,06	100%	6,71	4,20	104
9 Shelter	10,75	16,37	5,95	3,88	0,00	7,46	6,37	50,78	100%	6,02	4,13	30
10 At my permanent	0,00	26,00	3,22	1,03	0,52	2,27	4,17	37,20	100%	4,73	2,15	13
11 Holiday apartment	43,45	32,37	5,46	2,93	3,65	2,89	1,06	91,80	100%	8,95	3,03	41
12 Youth hostel	36,88	23,83	3,39	3,04	0,30	5,22	4,69	77,35	100%	8,07	4,00	22
99 Other	11,17	16,98	7,49	4,18	4,97	4,21	4,15	53,15	100%	5,20	4,37	57
Total	28,45	20,98	5,83	3,88	1,47	4,43	3,35	68,39	100%	6,57	3,44	1364
Partner - Overnight	Q8 1 EUR accom	Q8 2 EUR food	Q8 3 EUR activi	Q8 4 EUR local	Q8 5 EUR rental	Q8 6 EUR transport	Q8 7 EUR other	Q8 8 EUR total	Q2 any nights 0 1	Q3 nights	Q16 group	N: Resp.
Pomerania	15,63	13,62	3,06	1,87	1,33	6,01	4,45	45,97	100%	3,05	2,94	200
West Pomerania	30,77	14,27	4,73	3,37	1,65	1,07	0,92	56,79	100%	7,73	4,43	272
Mecklenburg-Vorpom	40,48	29,07	5,31	2,24	1,46	1,49	0,04	80,09	100%	8,49	2,57	244
Bornholm	26,78	22,31	7,03	6,09	1,26	4,47	4,20	72,14	100%	7,03	4,53	343
DK South	27,02	23,82	7,89	4,93	1,63	7,99	6,16	79,44	100%	5,83	2,53	344
Total	28,41	21,06	5,93	4,01	1,47	4,38	3,36	68,61	100%	6,56	3,44	1403
Partner - Same day	Q8 1 EUR accom	Q8 2 EUR food	Q8 3 EUR activi	Q8 4 EUR local	Q8 5 EUR rental	Q8 6 EUR transport	Q8 7 EUR other	Q8 8 EUR total	Q2 any nights 0 1	Q3 nights	Q16 group	N: Resp.
Pomerania	0,00	4,80	0,89	0,51	1,79	0,47	0,97	9,43	0%	0,00	2,45	301
West Pomerania	0,00	5,63	1,59	1,45	3,92	0,30	0,07	12,95	0%	0,00	3,21	126
Mecklenburg-Vorpom	0,00	7,47	0,34	0,68	0,32	0,51	0,00	9,31	0%	0,00	1,70	74
Bornholm	0,00	16,39	12,70	12,67	2,47	12,13	3,88	60,23	0%	0,00	3,74	19
DK South	0,00	7,63	1,77	2,01	0,12	2,28	1,58	15,38	0%	0,00	2,06	207
Total	0,00	6,32	1,51	1,44	1,55	1,26	0,97	13,05	0%	0,00	2,43	727
Partner - Total	Q8 1 EUR accom	Q8 2 EUR food	Q8 3 EUR activi	Q8 4 EUR local	Q8 5 EUR rental	Q8 6 EUR transport	Q8 7 EUR other	Q8 8 EUR total	Q2 any nights 0 1	Q3 nights	Q16 group	N: Resp.
Pomerania	6,24	8,32	1,75	1,05	1,61	2,68	2,36	24,02	40%	1,22	2,65	501
West Pomerania	21,03	11,54	3,73	2,76	2,37	0,83	0,66	42,91	68%	5,28	4,04	398
Mecklenburg-Vorpom	31,06	24,05	4,15	1,88	1,19	1,26	0,03	63,62	77%	6,52	2,36	318
Bornholm	25,38	22,00	7,33	6,43	1,32	4,87	4,18	71,51	95%	6,64	4,48	362
DK South	16,87	17,73	5,59	3,83	1,06	5,85	4,44	55,37	62%	3,55	2,35	551
Total	18,71	16,03	4,42	3,13	1,50	3,31	2,54	49,64	66%	4,28	3,10	2130

Overall, spending by overnight cyclists was 68.61 EUR per person per night. 42% was spent on accommodation, 31% on food, 9% on activities, 6% on local products, 6% on transport, 2% on bicycle rental and 5% on other items or services.

Overall, spending by one-day (same day) cyclists was 13.05 EUR per person per day. 48% was spent on food, 12% on activities, 11% on local products, 12% on bicycle rental, 10% on transport and 7% EUR on other items or services.

Region by region review of survey results

Pomerania, Poland

In Pomerania of Poland (the province around Gdansk) 506 questionnaires were filled in. In Pomerania all respondents were leisure or holiday cyclists.

In Pomerania 92% of responses were collected in September – 2018.

In Pomerania, 60% of the cyclists in the survey were excursionists, one-day cyclists without any overnight. 31% spent 1-3 nights away, 8% spent 4-7 nights, 1% spent 8-14 nights, while only 2 out of 505 spent 15 night or more away.

In Pomerania, as many as 78% of those cyclists who spent at least two nights away, stayed at two or more different places overnight.

In Pomerania 91% of the overnight cyclists used commercial accommodations. Private homes (paid), bed and breakfast places and normal camping sites were the three most frequently used types of accommodation in Pomerania, accounting for 71% of the cyclists in the survey.

Stays at private homes (paid) lasted 3.3 nights, stays at camping sites (normal) lasted 3.9 nights, and bed and breakfast 3.4 nights, overall 3.6 nights, among those cyclists staying overnight.

At accommodations in Pomerania, there were 2.9 persons per cycle group.

Only 1% of the recreational cyclists in Pomerania regarded cycling as only a means of transport.

To get to the cycle area in Pomerania, car is the main mode of transport (45%). To cycle all the way without any other modes of transport is also common (25%). Train is used by as many as 27% of cyclists in Pomerania while bus is used by only 1%.

For 49% of the recreational cyclists in Pomerania the possibility of biking was either quite important or very important in the choice of destination.

In Pomerania 51% of respondents were under 40, 49% 40 or over.

In Pomerania 12% of the recreational cyclists, cycle only on holiday.

2% of cyclists visiting Pomerania mentioned something regarding organisers of their trip including Kuoni (cyclists from Switzerland) and TUI (cyclists from Germany). Also they mentioned: Travel agency in Leipzig, I would like travel agencies to offer bicycle tours, members of the Grudziadz bicycle association, Colleague, Local bicycle group, Friends from Germany, The coach of our cycling club, Friends helped me, friend.

In Pomerania, Germany was the main foreign market accounting for 7.3%, while the Czech Republic and Sweden accounted for 2.4% each, Austria 1.8%. Additional markets included

Austria, Belarus, Latvia, Lithuania, Slovakia, Denmark, Finland, Switzerland, Hungary, Russia, Netherlands, Portugal and Spain.

Of the 10 main postal districts in Poland, Gdansk accounted for 116 out of 491 responses, i.e. 23%. Szczecin and Poznan accounted for 9% and 8%, respectively.

40% of cyclists in Pomerania spent at least one night away. Including same day cyclists (no overnights) the average number of nights spent away was 1.24 nights. – For those cyclists who spent at least one night away spent 3.1 nights. Among those who spent at least two nights away, 22% stayed the same place all nights. This also means that as many as 78% of cyclists in this survey visiting Pomerania stayed at different places during their (cycling) holiday.

In average, excursionists and holidaymakers visiting Pomerania spent about 5 hours and 18 minutes on their cycling tour per day, cycling about 39 km. Cycling was somewhere between "not so important" and "quite important" factor in the decision to come to Pomerania, i.e. 2.5 on a scale from 1 to 4.

The average group size in Pomerania was 2.6. Average age of respondents (adults) cyclists in Pomerania was 41.9 year. In average, there were 0.3 child up to 14 years of age in each group. In 25% of the travel groups in Pomerania at least one person had rented the bicycle used to this tour. 7% used electric bicycles. On a scale from 1 to 5 cycle habits averaged 3.3, where 3 means "several times per month" and 4 means, "cycling several times a week".

Among cyclists in Pomerania, the most important aspects of the cycling destinations was "natural scenery" (4.4) followed by "surface" (4.0). Signs, wellness and culture were of equal importance (3.7).

"Natural scenery" was the aspect in Pomerania, which gained the highest satisfaction score (4.5). That was the case in the four other regions as well.

In average, 1.98 (i.e. close to two) information sources were used by cycle tourists and cycle excursionists in Pomerania. Internet was the main source of information (used by 62% in relation to the cycle trip) followed by family/friends (43%) and guidebook (21%).

In Pomerania, just 2.3% of cyclists used a tour operator to organize their bike trip. On the other hand, close to 98% organized their trip individually (themselves).

75% of cyclists in Pomerania were from Poland. 49% mentioned another country where they might like to cycle. 49% were men, 51% women. On a local scale from 1 to 5, where 4 means 1707-2971 PLN per month after tax, the average score was 4,27.

In Pomerania, spending by overnight cyclists was 45.97 EUR per person per night, of which 15.63 was spent on accommodation, 13.62 EUR on food, and 6.01 EUR on transport. - In Pomerania, spending by one-day (same day) cyclists was 9.43 EUR per person per day of which 4.80 was spent on food.

West Pomerania, Poland

In West Pomerania of Poland, the province around Szczecin (Stettin) 400 questionnaires were filled in. All respondents here were leisure or holiday cyclists.

In West Pomerania 75% of responses were collected in July and August, the rest in June – 2018.

In West Pomerania, 32% of the cyclists in the survey were excursionists, one-day cyclists without any overnight. 5% spent 1-3 nights away, 33% spent 4-7 nights, 30% spent 8-14 nights, while only 1% spent 15 night or more away.

In West Pomerania, 34% of those cyclists who spent at least two nights away, stayed at two or more different places overnight.

In West Pomerania just over 91% of the overnight cyclists used commercial accommodations. Hotels were the main type of accommodation used by cyclists in the region accounting for 37% of responses, while private homes (paid) accounted for 33%. - Stays with at least one overnight stay lasted 7.8 nights in average.

At accommodations in West Pomerania, there were as many as 4.4 persons per cycle group. - Only 1% of the recreational cyclists in West Pomerania regarded cycling as just a means of transport. 60% regarded cycling as an activity while on holiday, 39% considered themselves to be on a cycling holiday.

To get to the cycle area in West Pomerania, car is the main mode of transport (57%). To cycle all the way without any other modes of transport is also common (35%). Train was used by 8% of cyclists in West Pomerania.

For 64% of the recreational cyclists in West Pomerania the possibility of biking was either quite important or very important in the choice of destination.

In West Pomerania 63% of respondents were under 50, 37% 50 or over.

In West Pomerania 12% of the recreational cyclists, cycle only on holiday while 58% cycle at least several times per week.

None of cyclists visiting West Pomerania mentioned anything regarding organisers of their trip.

In West Pomerania, domestic (Polish) cyclists accounted for 84%. Germany was the main foreign market accounting for 13%, other (mostly from Czech Republic) 3%. Among those, staying at least one night, Polish cyclists accounted for 77%, Germans 19%, Czechs and others 4%.

Of the 10 main postal districts in Poland, Szczecin accounted for 93 out of 400 responses, i.e. 23%. Wroclaw and Poznan accounted for 16% and 13%, respectively. Obviously, geography and physical proximity play a role in destination choice.

69% of cyclists in West Pomerania spent at least one night away. Including same day cyclists (no overnights) the average number of nights spent away was 5.3 nights. – For those cyclists who spent at least one night away spent 7.7 nights. Among those who spent at least two nights away, 66% stayed the same place all nights. This also means that 34% of cyclists in this survey visiting West Pomerania stayed at different places during their (cycling) holiday.

In average, excursionists and holidaymakers visiting West Pomerania spent about 4 hours and 47 minutes on their cycling tour per day; cycling about 39 km. Cycling was “quite important” factor in the decision to come to West Pomerania, i.e. 2.9 on a scale from 1 to 4.

The average group size in West Pomerania was 4.0. Average age of respondents (adults) cyclists in West Pomerania was 44.8 year. In average, there were 0.3 child up to 14 years of age in each group. In 33% of the travel groups in West Pomerania, at least one person had rented the bicycle used to this tour. 9% used electric bicycles. On a scale from 1 to 5 cycle habits averaged 3.7, where 3 means “several times per month” and 4 means, “cycling several times a week”.

Among cyclists in West Pomerania, the most important aspects of the cycling destinations was “natural scenery” and “safe lock”, both 4.2, followed by “signs” (4.1), and “surface” (4.0) and “wellness (also 4.0).

“Natural scenery” was the aspect in West Pomerania, which gained the highest satisfaction score (4.5). That was the case in the four other regions as well. Satisfaction with “wellness” was as high as 4.1 in West Pomerania. The willingness to recommend West Pomerania to others was 4.3 on a 1-5 scale.

In average, 1.29 information sources were used by cycle tourists and cycle excursionists in West Pomerania. Internet was the main source of information (used by 61% in relation to the cycle trip) followed by family/friends (26%) and map (17%).

In West Pomerania, all cyclists organized their trip individually (themselves).

84% of cyclists in West Pomerania were from Poland. 44% mentioned another country where they might like to cycle. 55% were men, 45% women. On a local scale from 1 to 5, where 4 means 1707-2971 PLN per month after tax, the average score was 4,22.

In West Pomerania, spending by overnight cyclists was 56.79 EUR per person per night, of which 30.77 was spent on accommodation, 14.27 EUR on food, and 4.73 EUR on activities. - In West Pomerania, spending by one-day (same day) cyclists was 12.95 EUR per person per day of which 5.63 was spent on food.

Mecklenburg-Vorpommern, Germany

In Mecklenburg-Vorpommern in the north east of Germany a total of 858 cyclists participated in the survey, of which 322 (38%) cycled for recreational purpose, 536 (62%) cycled for daily activities. In the following review, only the recreational cyclists (excursionists and overnight tourists) are included.

In Mecklenburg-Vorpommern all responses were collected in October – 2018.

In Mecklenburg-Vorpommern, 24% of the cyclists in the survey were excursionists, one day cyclists without any overnight while three out of four (76%) spent at least one night away from home. 13% spent 1-3 nights away, 37% spent 4-7 nights, 22% spent 8-14 nights, while 4% spent 15 night and up to 3 months away.

In Mecklenburg-Vorpommern, 27% of those cyclists who spent at least two nights away, stayed at two or more different places overnight.

In Mecklenburg-Vorpommern 88% of the overnight cyclists used commercial accommodations. Hotels were the main type of accommodation used by cyclists in the region accounting for 32% of responses, while bed and breakfast accounted for 17%, holiday apartments (Fewo) 14%. - Stays with at least one overnight stay lasted 8.8 nights in average.

At accommodations in Mecklenburg-Vorpommern, there were 2.5 persons per cycle group. None of the recreational cyclists in Mecklenburg-Vorpommern regarded cycling as just a means of transport. 48% considered themselves to be on a cycling holiday.

52% regarded cycling as one activity (among other activities) while on holiday.

To get to the cycle area in Mecklenburg-Vorpommern, car is the main mode of transport (50%). Train was used by 24% of cyclists in Mecklenburg-Vorpommern. To cycle all the way without any other modes of transport is also common (21%).

In Mecklenburg-Vorpommern just 20% of respondents were under 50, while 80% were 50 or over, in the month of October, when the survey was undertaken in Mecklenburg-Vorpommern. The average age was 58.2.

In Mecklenburg-Vorpommern 78% of the recreational cyclists, cycle at least several times per week.

3% of cyclists visiting Mecklenburg-Vorpommern mentioned an organiser of their bicycle trip, specifically Mecklenburger Radtour, Berr-Reisen, ADFC, Die Landpartie, Kofahl-Reisen and Polster & Pohl (Leipzig).

In Mecklenburg-Vorpommern, domestic (German) cyclists accounted for 96% of respondents. Foreign countries represented were Switzerland, Netherlands, Belgium, Sweden, USA and Australia.

Of the 16 Bundesländer (states) of Germany, the largest number of cyclists came from Mecklenburg-Vorpommern itself, Nordrhein-Westfalen and Berlin. Per million inhabitants, the

largest number of cyclists came from Mecklenburg-Vorpommern itself, Berlin, Schleswig-Holstein and Hamburg. When controlling for differences in population it is clear that proximity (relatively short travel distance) plays a role for cyclists in their choice of destination like for other tourists.

76% of cyclists in Mecklenburg-Vorpommern spent at least one night away. Including same day cyclists (no overnights) the average number of nights spent away was 6.4 nights. – For those cyclists who spent at least one night away spent 8.5 nights. Among those who spent at least two nights away, 73% stayed the same place all nights. This also means that 27% of cyclists in this survey visiting Mecklenburg-Vorpommern stayed at different places during their (cycling) holiday.

In average, excursionists and holidaymakers visiting Mecklenburg-Vorpommern spent about 4 hours and 18 minutes on their cycling tour per day; cycling about 42 km. Cycling was “not so important” a factor in the decision to come to Mecklenburg-Vorpommern, i.e. 1.8 on a scale from 1 to 4. 82% and 83% did not start their cycle trip from home.

The average group size in Mecklenburg-Vorpommern was 2.4. Average age of respondents (adults) cyclists in Mecklenburg-Vorpommern was 58.2 year. There were no children aged 14 or younger in the cycle groups at this time of year, October. In 16% of the travel groups in Mecklenburg-Vorpommern at least one person had rented the bicycle used to this tour. As many as 39% used electric bicycles, cf. also the relatively high average age. On a scale from 1 to 5 cycle habits averaged 4,1, where 4 means, “cycling several times a week”.

Among cyclists in Mecklenburg-Vorpommern, the most important aspects of the cycling destinations was “natural scenery” (4.7 on 1-5 scale), followed by surface and “signs” (4.3 each), and “safe lock” (4.1).

“Natural scenery” was the aspect in Mecklenburg-Vorpommern, which gained the highest satisfaction score, as high as 4.8. Satisfaction with “accommodation” got the second highest satisfaction score with 4.1 in Mecklenburg-Vorpommern. The willingness to recommend Mecklenburg-Vorpommern to others was as high as 4.6 on a 1-5 scale.

In average, 1.91 information sources were used by cycle tourists and cycle excursionists in Mecklenburg-Vorpommern. Three information sources was used about equally often, namely Internet (43%), maps (43%), and prior knowledge (41%).

In Mecklenburg-Vorpommern, almost 96% of all recreational cyclists organized their trip individually (themselves). 96% came from Germany. 76% mentioned another country that they might like to visit and cycle there. 48% were men, 52% women. On a local scale from 1 to 5, where 3 means 1519-1945 EUR and 4 means 1946-2585 EUR per month after tax, the average score was 3,64. Only 35% of cyclists in Mecklenburg-Vorpommern chose to answer the income question, i.e. almost 2 out of 3 passed on this question. Because of earlier savings, means for spending may be relatively high, although the time at the labour market with 51% being 60+. Thus spending per night is high in Mecklenburg-Vorpommern.

In Mecklenburg-Vorpommern, spending by overnight cyclists was 80.09 EUR per person per night, of which 40.48 was spent on accommodation, 29.07 EUR on food, and 5.31 EUR on activities. - In Mecklenburg-Vorpommern, spending by one-day cyclists was 9.31 EUR per person per day of which 7.47 was spent on food.

80% of recreational cyclists (same day and overnight) in Mecklenburg-Vorpommern follow a designated bike route. 79% mention the same start and finish place for their entire cycle trip. 64% of the recreational cyclists in Mecklenburg-Vorpommern had previously made a bicycle holiday there, in average almost six times (5.83). Cycle routes in Mecklenburg-Vorpommern often cycled before included Müritz Rund (37%),

Seen Radweg (32%), Ostseeküsten RW (30%, even unprompted), Berlin-Copenhagen (18% and Oder Neisse (18%).

Bornholm, Denmark

On Bornholm island, Denmark, 455 questionnaires were collected, one half in the port of Nexø before Polish cyclists returned to Kolobrzeg, and the other half in the port of Rønne before cyclists parted to Mukran/Sassnitz on the island of Rügen in Germany or before departures to Køge, Denmark. All respondents here were leisure or holiday cyclists.

Bornholm 44% of responses were collected in July, and 56% in August – 2018. On Bornholm, all four language versions of the questionnaire were used: 52% Polish, 34% German, 12% Danish, 2% English (for example for Dutch or Czech cyclists).

On Bornholm, 96% of the cyclists were overnight tourists, while just 4% were one-day cyclists without any overnight. 17% spent 1-3 nights, 37% spent 4-7 nights, 20% spent 8-14 nights, while 5% spent from 15 and up to 25 night on the island.

On Bornholm, 59% of those cyclists, who spent at least two nights away, stayed at two or more different places overnight.

On Bornholm about 77% of the overnight cyclists used commercial accommodations, 20% used partly free, partly commercial accommodations, while 3% free private accommodations. Normal and primitive camping accounted for 33%+10%=43%, and rented holiday cottages 18% of responses. - Stays with at least one overnight stay lasted 7.1 nights in average.

At accommodations On Bornholm, there were as many as 4.9 persons per cycle group. - 13% of the recreational cyclists On Bornholm regarded cycling as just a means of transport. 51% regarded cycling as one of several different activities undertaken while on holiday. 36% considered themselves to be on a cycling holiday.

To get to and from Bornholm island, all respondents used one of the ferries. No interviews were undertaken at yacht ports or the airport. At other destinations almost no cyclists flew, which is most likely also the case for Bornholm. Ferry including bicycle only was mentioned by 55%, combinations involving train 22%, combinations with car about 19%, combinations with bus 4%.

For as many as 81% of the holiday cyclists on Bornholm, the possibility of biking was either quite important or very important in the choice of destination.

On Bornholm 64% of respondents were under 50, of which one in ten was under 18 (9-17). 36% were 50 or over.

On Bornholm 7% of the holiday cyclists cycle only when on holiday while 59% normally cycle at least several times per week.

6% of cyclists visiting Bornholm mentioned something regarding organisers of their trip. Operators mentioned included Horyzonty of Poland, Mecklenburger Radtour of Germany, and Bornholmtours, Bornpol and Lindesdal based locally on Bornholm, DK.

On Bornholm, Polish cyclists accounted for 52% of respondents in the survey. German cyclists accounted for 30%, Danes 15%, other nationalities the remaining 3%. As mentioned, most of the cyclists (96%) stayed overnight.

Of the five regions in Denmark, the Capital Region accounted for a little more than half (53%) of the Danish cycle tourist on Bornholm. Region Sealand accounted for 34%. Relatively few of the Danish cyclists on Bornholm came from the west side of Great Belt Bridge (13%).

Geography, travel distance, travel time, travel costs obviously plays a role also for Danes when they chose a destination for their cycle holiday.

Of the main postal districts in Poland, Szczecin, Warsaw, Gdansk and Poznan accounted for the highest number and percentage of Polish visitors to Bornholm, 23%, 16%, 16%, and 14%, respectively. Again, geography and physical proximity play a role in destination choice, also for cyclists.

Among the 16 Bundesländer ("states") in Germany, Berlin and Schleswig-Holstein accounted for 26% and 16%, respectively, of holiday cyclists from Germany to Bornholm. When adjusting for differences in population, among cyclists from Germany visiting Bornholm, residents from Berlin, Schleswig-Holstein, Mecklenburg-Vorpommern and Hamburg were those who were most inclined to choose Bornholm as a destination for their bicycle holiday.

96% of cyclists on Bornholm spent at least one night away. Including same day cyclists (no overnights) the average number of nights spent away was 6.7 nights. – For those cyclists who spent at least one night away spent 7.0 nights. Among those who spent at least two nights away, 41% stayed the same place all nights. This also means that 59% of cyclists in this survey visiting Bornholm stayed at different places during their (cycling) holiday.

In average, cyclists visiting Bornholm spent about 5 hours and 16 minutes on their cycling tour per day; cycling about 43 km. Cycling was "quite important" factor in the decision to come to Bornholm, i.e. 3.1 on a scale from 1 to 4. – 75% of cyclists interviewed on Bornholm, at least, had home as their next destination, which is no surprise, since interviews were undertaken when the cyclists were about to board a ferry from Bornholm bound for Poland, Germany or Denmark.

The average group size on Bornholm was as high as 4.0. Average age of responding cyclists on Bornholm was 43 year. In average, there were 0.8 child up to 14 years of age in each group. In 10% of the travel groups on Bornholm, at least one person had rented the bicycle used to this tour. 16% used electric bicycles. On a scale from 1 to 5 cycle habits averaged 3.7, where 3 means "several times per month" and 4 means, "cycling several times a week".

Among cyclists on Bornholm, the most important aspects of a cycling destination was "natural scenery" (4.4) and "signs" (3.9).

"Natural scenery" was the aspect on Bornholm, which gained the highest satisfaction score (4.6). That was the case in the four other regions as well. Satisfaction with surface (4.1), signs

(4.0), accommodation (4.0) and culture (4.0) was also high among cyclists visiting Bornholm. The willingness to recommend Bornholm to others was as high as 4.6 on a 1-5 scale.

Relatively many different information sources (in average 2.16) were used by bicycle tourists on Bornholm. Internet was clearly the main source of information (used by 70% in relation to the cycle trip) followed by family/friends (41%), map (35%) and guide book (30%).

On Bornholm, more than 10% of all cyclists used a tour operator or travel agency to organize their cycle holiday. Those cyclists, who handed back their rented bicycle to the tour operator before walking on to the ferry in the port of Rønne were generally not interviewed, and therefore the true percentage could be higher. On the other hand, those cyclists who transport their bicycle on their car were not included in this survey either, and they don't make use of anybody to organise their tour except perhaps the cottage letting agency.

84% of cyclists on Bornholm were international, i.e. not from Denmark. 77% mentioned another country where they might like to cycle. 56% were men, 44% women. On a local scale from 1 to 5, average income score was 3,75.

On Bornholm, spending by overnight cyclists was 72.14 EUR per person per night, of which 26.78 was spent on accommodation, 22.31 EUR on food, and 7.03 EUR on activities. On Bornholm, spending by one-day (same day) cyclists was as high as 60.23 EUR per person per day of which 16.39 was spent on food, and 12 or 13 EUR on the items "activities", "local products", and "transport".

Southern parts of mainland Denmark

The six interview points of the bicycle survey in this part of Denmark were Møn, Marienlyst/Maribo, Skælskør/Korsør, Svendborg/Tåsinge, Sønderborg/Sønderhav

Kolding/Middelfart with about 100 from each interview point, 602 in total.

All respondents were leisure or holiday cyclists. We shall refer to the area as southern parts of Denmark.

In southern parts of Denmark 34% of responses were collected in July and 66% in August 2018. In southern parts of Denmark, 36% of the cyclists in the survey were excursionists, i.e. one-day cyclists without any overnight. 18% spent 1-3 nights away, 13% spent 4-7 nights, 33% spent 8-14 nights, while only none spent 15 night or more away.

In southern parts of Denmark, 59% of those cyclists who spent at least two nights away, stayed at two or more different places overnight.

In southern parts of Denmark just 62% of the overnight cyclists used commercial accommodations and further 25% used partly commercial accommodations, 13% used non-commercial accommodations. Camping (commercial and primitive) was the main type of accommodation used by cyclists in the region accounting for 33%+11%=44% of responses, while hotels and bed & breakfast accounted for 8%+12%=20%. - Stays with at least one overnight stay lasted 6.1 night in average.

At accommodations in southern parts of Denmark, there were 2.5 persons per cycle group. – As many as 13% of the recreational cyclists in southern parts of Denmark regarded cycling as just a means of transport. 51% regarded cycling as one of several different activities while on holiday, while 36% considered themselves to be on a cycling holiday.

To get to the cycle area in southern parts of Denmark, car is the main mode of transport (49%). To cycle all the way without any other modes of transport is also common (32%). Train was used by 9% of cyclists in southern parts of Denmark.

For 60% of the recreational cyclists in southern parts of Denmark the possibility of biking was either quite important or very important in the choice of destination.

In southern parts of Denmark 52% of respondents were under 50, 48% 50 or over.

In southern parts of Denmark just 2% of the recreational cyclists cycle only on holiday while as many as 85% cycle at least several times per week.

Just 1% of cyclists visiting southern parts of Denmark mentioned something regarding organisers of their trip.

In southern parts of Denmark, domestic (Danish) cyclists accounted for 63%. Germany was the main foreign market accounting for 17%, Netherlands 8%, other nationalities 12%. Among those staying at least one night, Danish cyclists accounted for 48%, Germans 24%, others 28%.

Of the five regions in Denmark, the Capital Region accounted for just 11% of the Danish cycle tourist in southern parts of Denmark. Region Zealand accounted for 36%. Relatively many of the Danish cyclists in Southern parts of Denmark came from the west side of Great Belt Bridge (53%).

Among holiday cyclists from Germany in the southern parts of Denmark, Schleswig-Holstein accounted for 28%, Hamburg and Niedersachsen 13% each, Berlin 11%, and Nordrhein-Westfalen 9%. When adjusting for differences in population, among cyclists from Germany visiting southern parts of Denmark, residents from Schleswig-Holstein, Hamburg, Mecklenburg-Vorpommern and Berlin were those who were relatively much inclined to choose Southern parts of Denmark as a destination for their bicycle holiday.

66% of cyclists in southern parts of Denmark spent at least one night away. Including same day cyclists (no overnights) the average number of nights spent away was 3.7 nights. – For those cyclists who spent at least one night away spent 5.8 nights. Among those who spent at least two nights away, 41% stayed the same place all nights. This also means that 59% of cyclists in this survey visiting southern parts of Denmark stayed at different places during their (cycling) holiday.

In average, cyclists visiting southern parts of Denmark spent about 3 hours and 53 minutes on their cycling tour per day, cycling about 27 km. Cycling was close to being “quite important” factor in the decision to come to Southern parts of Denmark, i.e. 2.8 on a scale from 1 to 4. – 62% of cyclists interviewed in southern parts of Denmark had home as their starting point of the trip (today), and 62% had home as their next destination.

The average group size in southern parts of Denmark was 2.4. Average age of responding cyclists in southern parts of Denmark was 47 year. In average, there were 0.3 child up to 14 years of age in each group. In 7% of the travel groups in southern parts of Denmark, at least one person had rented the bicycle used to this tour. 19% used electric bicycles. On a scale from 1 to 5 cycle habits averaged as high as 4.2, where 4 means “cycling several times a week” and 5 means (almost) every day.

Among cyclists in southern parts of Denmark, like at other destinations, the most important aspects of a cycling destination was “natural scenery” (4.3), “surface” (3.8) and “signs” (3.7).

“Natural scenery” was the aspect in southern parts of Denmark, which gained the highest satisfaction score (4.4). That was the case in the four other regions as well. Satisfaction with surface (3.9) and signs (3.9) was also high among cyclists visiting southern parts of Denmark. The willingness to recommend southern parts of Denmark to others was as high as 4.5 on a 1-5 scale.

In average, 1.9 information sources were used by bicycle tourists in southern parts of Denmark. Internet and prior knowledge was used by 45% each, map 23%, brochure, tourist information office and family/friends 19% each, and guidebook 17%.

In southern parts of Denmark, only 2% of all recreational cyclists used a tour operator or travel agency to organize their cycle holiday.

37% of cyclists in southern parts of Denmark were international, while 63% came from Denmark. 59% mentioned another country where they might like to cycle. 63% were men, 37% women. On a local scale from 1 to 5, average income score was 3.31.

In southern parts of Denmark, spending by overnight cyclists was 79.44 EUR per person per night, of which 27.02 was spent on accommodation, 23.82 EUR on food, 7.99 on transport, and 7.89 EUR on activities. - In southern parts of Denmark, spending by one-day cyclists was 15.38 EUR per person per day of which 7.63 was spent on food.