

# Danube Cycling Tourists Survey (2024)

## Main learnings

Interreg  
Danube Region



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Active2Public Transport




### KEY NUMBERS

 **5,000+**  
survey respondents

 **76%**  
respondents from the  
Danube Region

 **4.6/5**  
satisfaction rating  
with cycling holidays

 **53%**  
used rail to reach  
or depart from their  
destination

### INTRODUCTION

In 2024, the European Cyclists' Federation (ECF) carried out a transnational online survey on cycling tourism in the Danube Region, assessing users' needs, in cooperation with the Danube Office Ulm/Neu-Ulm. This survey is part of the Interreg Danube Region project Active2Public Transport (A2PT), aiming at a multimodal shift towards active and public transport. ECF implemented the online survey as a service provider for the Danube Office, which leads the activity. Below, you can find the main learnings from the survey as part of the EuroVelo Data Hub.

### FOUR MAIN LEARNING POINTS

**#1**  **Online surveys are useful tools to collect users' feedback, even when they are not representative of the general population**

This survey consisted of **an online questionnaire shared mainly via digital communication channels** from 18 September to 29 October 2024. It included 57 questions in total (the actual number of questions varied depending on previous answers), with an estimated completion time of ca. 10 minutes. It was available in 14 languages (from the



Danube countries, plus Dutch, English, French, Italian and Spanish). The main digital dissemination channels were: A2PT project partners, EuroVelo and ECF, and National EuroVelo Coordination Centres of the Danube countries. Targeted social media ad campaigns were implemented to increase the number of answers in certain Danube countries and reduce the difference in answering rates compared to the overall population.

This survey collected **more than 5,000 complete responses**, of which 76% came from residents of the project countries in the Danube Region. This sample is not representative of the general population with overrepresentation of male respondents (64% of respondents), middle-aged groups (84% in the sample, compared to 63% in Eurostat data), and regular and occasional cyclists (97% in our sample compared to 49% in a representative Eurobarometer survey in 2013).

The results of this survey are based on a non-representative sample with an overrepresentation of cyclists but still **give a valuable assessment of cycling tourist needs** for the Danube Region, which did not exist before. With cautious interpretation and comparison with other data sources, the online survey contributed to more knowledge on cycling tourist behaviours and needs.

For potential transferability, the list of questions used for this survey is shared at the end of the full report. ECF encourages more surveys to be carried out, ideally with a representative sample analysis adjusting the results. ECF encourages the **use of comparable methodologies throughout Europe**, inspired by the [ADFC Bicycle Travel Analysis](#), which is the main reference of its kind.



## Large satisfaction with cycling holidays from survey respondents

A large majority of our **respondents have already been on a cycling holiday (70%)**, defined as a holiday away from home, with at least one overnight stay, which involves cycling as the main activity during the holiday. 50% of respondents have already been on a cycling holiday in the Danube Region. However, despite high overall cycling levels in the sample, there are **important differences between national respondents**, the lowest share being in Serbia (38% of respondents have already been on a cycling holiday) and the highest in Germany (82%). This shows the potential for growth of cycling tourism in certain countries of the Danube Region.

The survey shows **very high satisfaction with cycling holidays** with an average score of 4.6 out of 5. 96% of respondents would go on a cycling holiday again. The main reasons for going on a cycling holiday are seeing more of a destination, being active and exploring routes only accessible by bicycle.

The results also provide interesting information about **cycling tourists' behaviour**: cycling holidays are longer than in national survey results, with a median of 6 days. Online information sources are preferred while planning a cycling holiday, and there is a high preference for linear cycle routes. A large majority of respondents uses their own bicycle (ca. 90%), with 1 out of 5 visitors of the Danube Region using an e-bike. The most important criteria for planning a cycling holiday are cycling infrastructure, the possibility of carrying bicycles on public transport, cycling-friendly services and accessibility of the destination by public transport.



### #3 Cycling tourists show high demand for public transport, which requires more offers

Many respondents used public transport to reach or depart from their destination, and especially rail: 53% in total, 49% of visitors of the Danube Region. This number is higher than the share of German cycling tourists according to the ADFC Bicycle Travel Analysis (40%). 35% of all respondents also stated that they used public transport during their cycling holiday. This confirms the **high demand from cycling tourists for public transport offers to access the destination** and during the cycling holiday.

**75% of public transport users carried their bicycle on public transport.** The capacity to transport bicycles on trains/buses and cycling-friendly public transport connections are identified as priority areas needing improvement – however, the first ranked area needing improvement is still cycling infrastructure.

The **overall satisfaction of cycling tourists with public transport is lower than the general satisfaction** with 3.3 out of 5. The satisfaction with digital tools for planning public transport journeys is rated higher (4/5) than taking one's own bike on public transport (3.5/5).

**Price, duration and convenience** are the most important criteria when choosing their mode of transport to/from the destination, while sustainability and cancellation options are slightly less important. **Online sources of information** are largely predominant but offline sources remain relatively more important for older generations.



### #4 Main recommendation: There is a high potential for the growth of cycling tourism in the Danube Region, which would require more developments and offers, especially in combination with public transport

The analysis of the survey results leads to **five main recommendations** for Danube stakeholders, detailed in the report:

- 1 Develop cycling tourism in the Danube Region further, to benefit from its high potential
- 2 Increase the quality of cycling infrastructure in the Danube Region to support the growth of cycling tourism, including sections close to public transport hubs
- 3 Improve the cycle-friendliness of public transport to increase the practice of cycling tourism
- 4 Provide sufficient capacity for carrying bicycles on public transport (especially trains and buses)
- 5 Improve online information on cycling tourism and public transport, including for international audiences.

[READ FULL REPORT](#)

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## Main learnings

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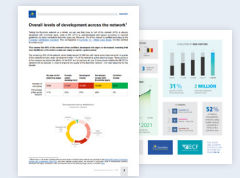
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#### EUROVELO DATA HUB

The [EuroVelo Data Hub](#) contains updated key figures and useful resources to monitor the growth of the European cycle route network and cycling tourism in general. It gathers data on EuroVelo network usage, route development, digital statistics and cycling tour operators' industry. Guidance on how to start monitoring cycle routes, cycling tourism and evaluating its economic impacts can also be found on [Pro.EuroVelo.com](#).



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