

The Danube Cycling Tourist Survey 2024

Background, Sample and Main Results

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Active2Public Transport (A2PT)

Better combining active and public transport in the Danube Region

- **EU-Project:** INTERREG Danube Regional Programme
- **Aim:** Reduction of CO2-emissions in the transport sector by fostering active mobility in combination with public transport
- **Lead Partner:** Austrian Energy Agency (AEA)
- **11** partners from **9** countries
- **Duration:** January 2024 – June 2026 (2,5 years)
- **Total Budget:** 2.856.023,50 Euro

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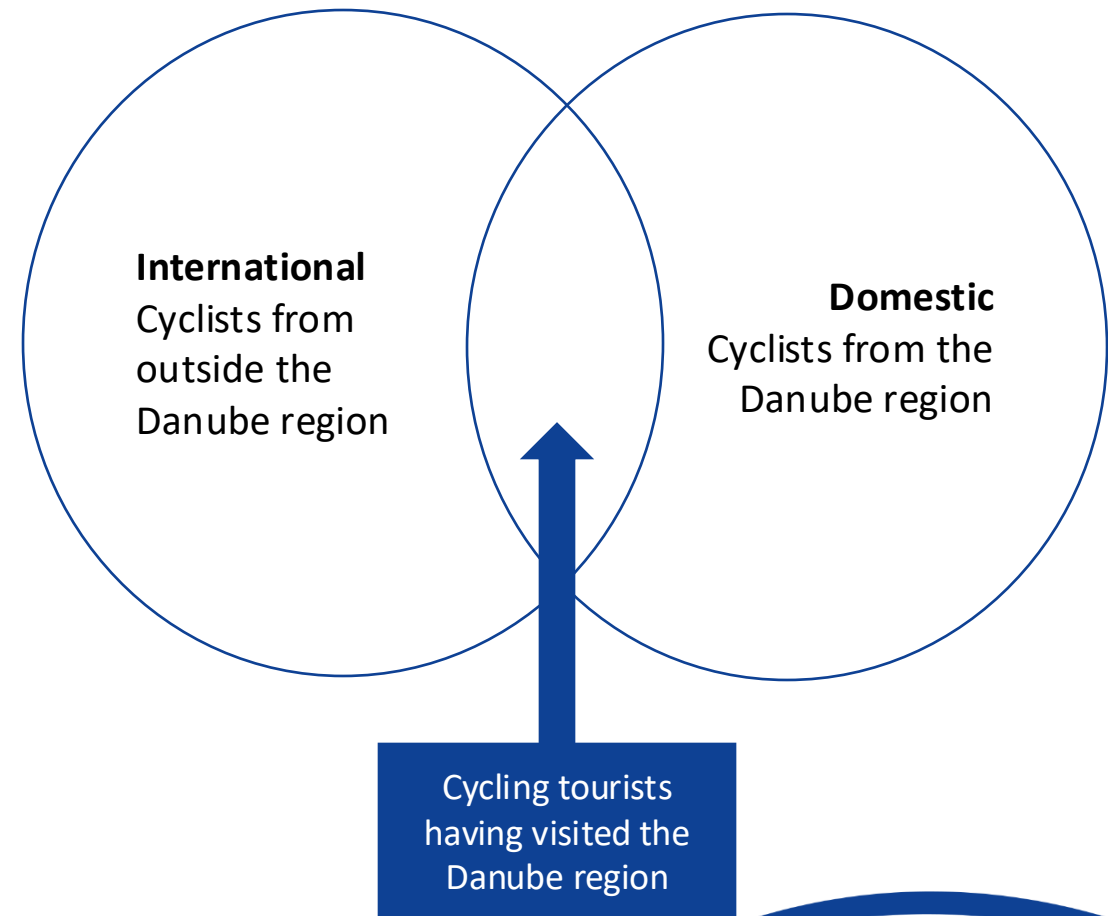
- **Project context:** needs assessment of different target groups
- **Project activity:** Analysing the needs and challenges of cycling tourists in the Danube region, especially regarding public transport
- **Implementation:** Conducting the 'Danube Cycling Tourist Survey 2024', with the **European Cyclists' Federation** as service provider
- **Survey period:** 18 September – 29 October 2024




EUROPEAN CYCLISTS' FEDERATION

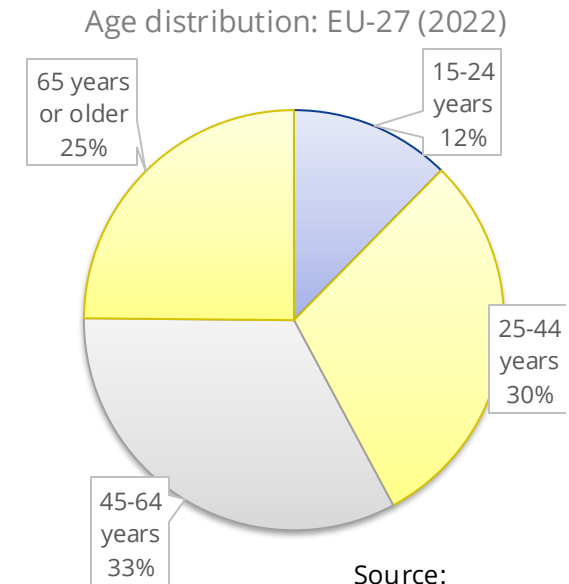
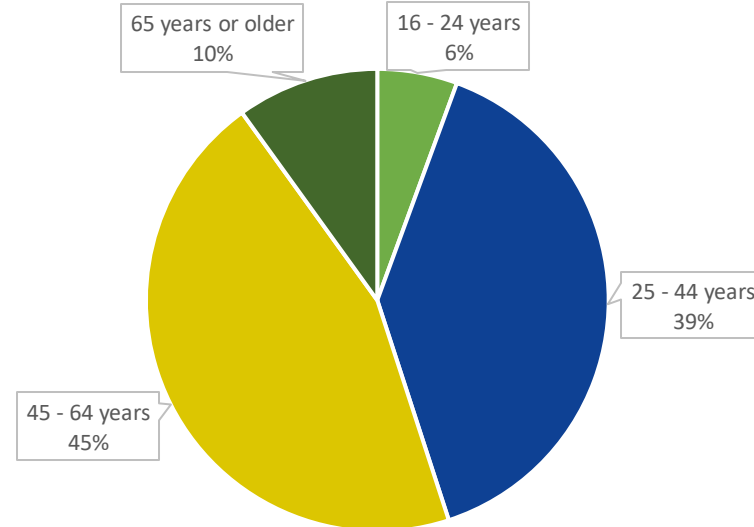
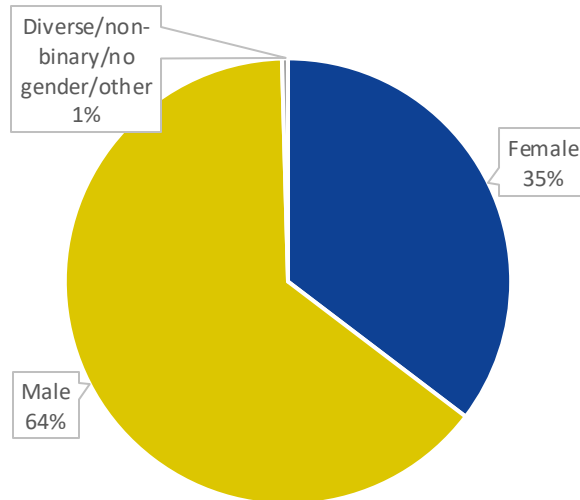
Target groups + outreach

- Survey available in **14 languages**
- Length: ca. 10 minutes
- Outreach channels:
 - EuroVelo channels
 - A2PT partner channels + contacts
 - Transnational social media ad campaign
- **5,053 completed responses**
(out of 7,584 in total)



The Survey Sample

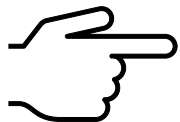
- Demographics: overrepresentation of male respondents + middle age groups (25-64 years) compared to overall population



Sample

- Project countries as countries of residence and destination of last cycling holiday

Project country	Respondents living in project country	Respondents indicating project country as destination of last cycling holiday	Ratio visitors/inhabitants
Austria	425	940	2.21
Croatia	216	297	1.38
Czechia	429	386	0.90
Germany (only BY+BW)	471	525	1.11
Hungary	477	506	1.06
Romania	684	344	0.50
Serbia	718	244	0.34
Slovakia	329	335	1.02
Slovenia	81	258	3.19



Familiarity with cycling holidays (full sample)

- **70% of respondents** have been on a cycling holiday* already though there are some significant regional differences
- **50% of respondents** have already been on a cycling holiday in the Danube region

Ever been on a cycling holiday?	DE (BY+BW)	AT	CZ	HU	SK	RO	SI	HR	RS
Yes	81.7%	81.0%	80.2%	77.8%	60.9%	56.9%	46.9%	45.5%	37.8%
No	18.3%	19.0%	19.8%	22.2%	39.1%	43.1%	53.1%	54.5%	62.3%

*Cycling holiday: holiday away from home, with at least one overnight stay, which involves cycling as main activity during the holiday)

Most frequently named destinations (full sample)

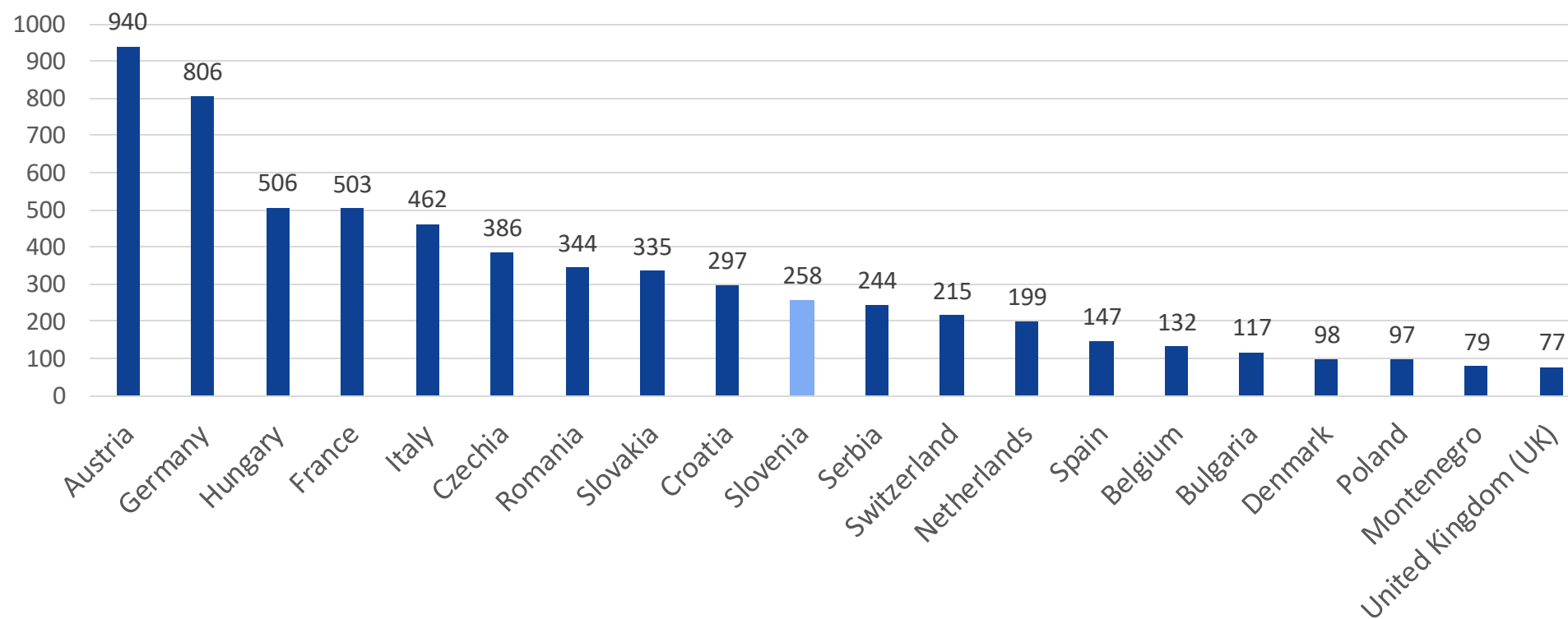
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20 most frequently named destinations of last cycling holiday

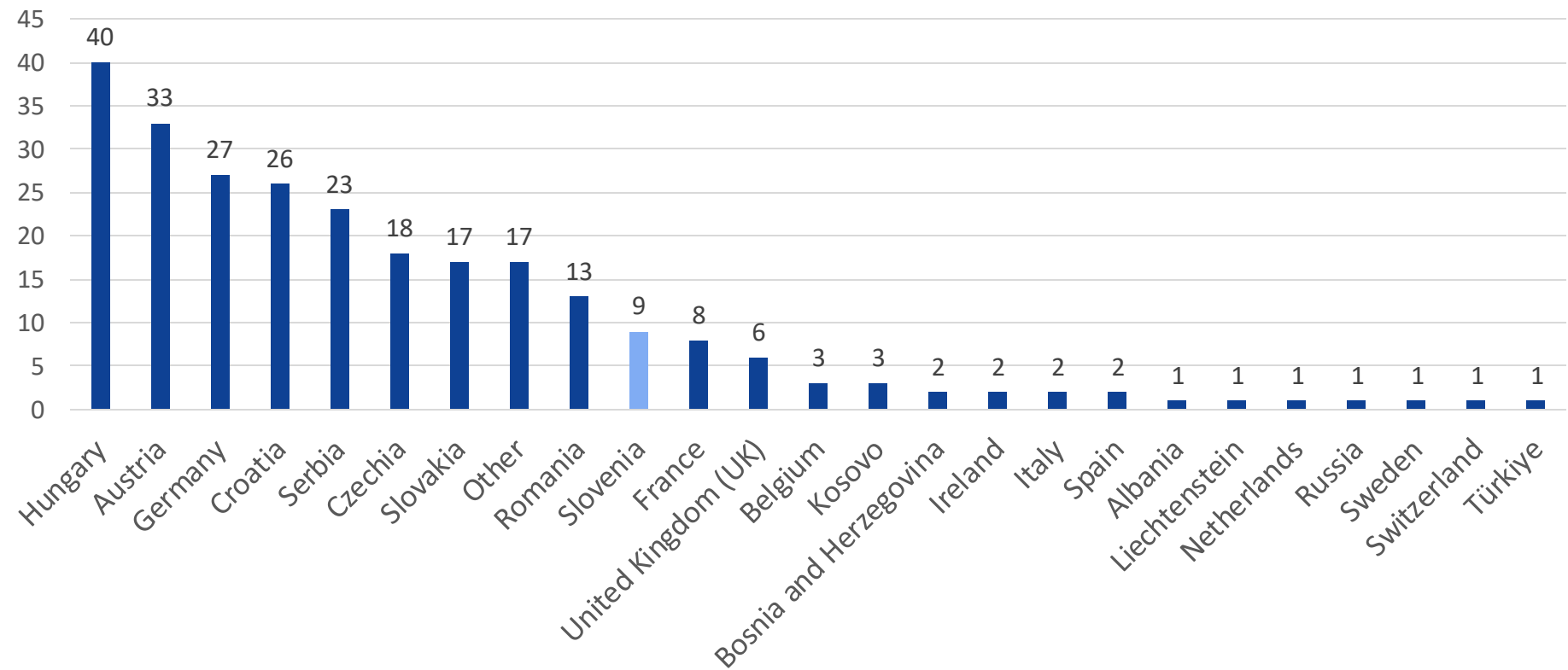




Who goes on cycling holidays in Slovenia? (visitors)



Country of residence of visitors to Slovenia (n=258)



Other	
United States	13
Australia	2
New Zealand	1
Other	1



Most popular destinations in Slovenia

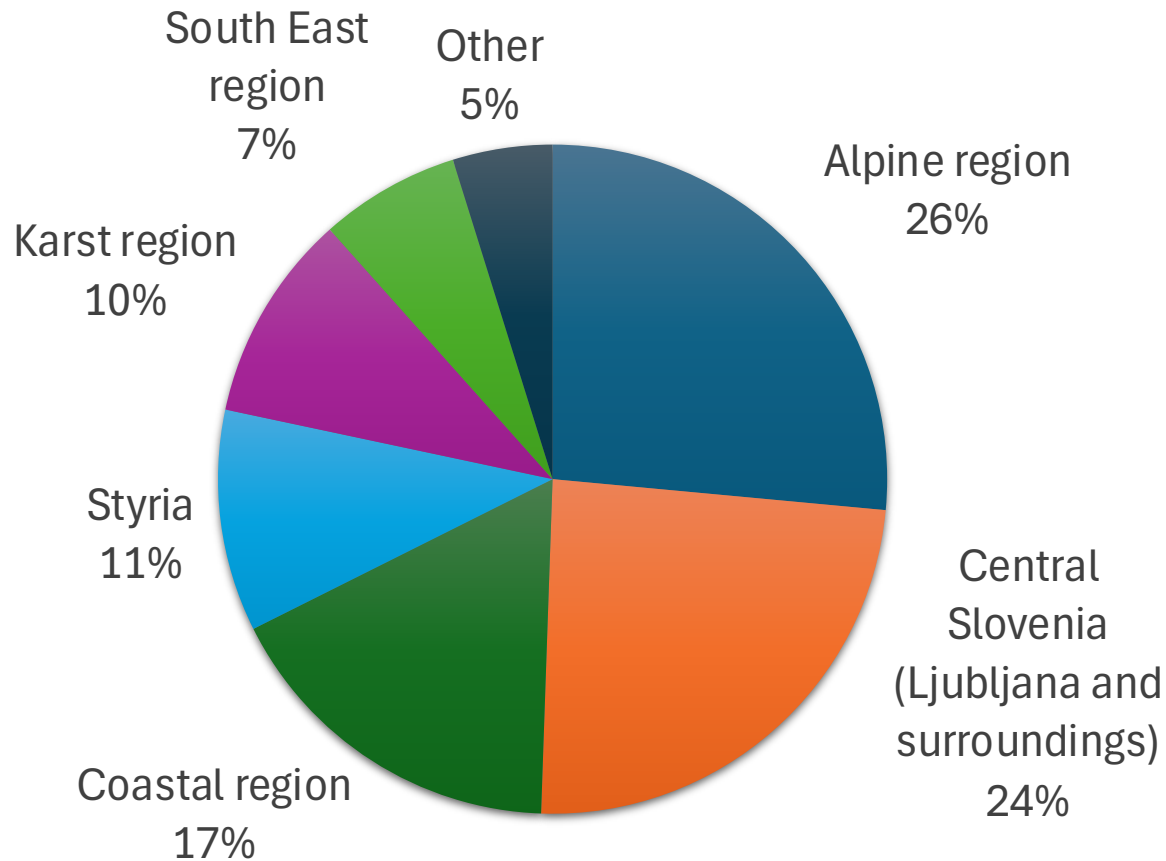
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Destinations of cycling holidays in Slovenia (Both Visitors and Residents)



Alpine region	121
Central Slovenia (Ljubljana and surroundings)	110
Coastal region	78
Styria	49
Karst region	46
South East region	31
Other	22

Reasons for going on a cycling holiday (full sample)

Top 3 named reasons (full sample + visitors to Slovenia) were:

- Seeing + experiencing more of your destination
- Being active during your holiday
- Experiences routes and landscapes only accessible by bike



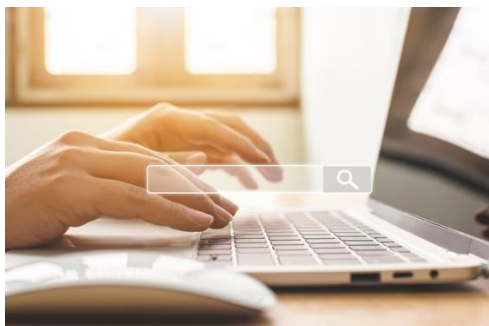
Criteria for cycling holidays (full sample)

Most important criteria are:

- Cycling infrastructure
- **Possibility to carry one's bike on public transport**
- Cycling-friendly services along the route
- **Accessibility by public transport**

	Visitors of Danube Region	Cycling holidays outside Danube Region
Dedicated cycling infrastructure available	4.24	4.13
Possibility to carry my bicycle on public transport.	3.56	3.87
Offer of cycling-friendly services along the route	3.38	3.26
Accessibility of the destination by public transport	3.27	3.63
Price of the trip	3.16	3.05
GPX tracks of the route easily accessible online	3.11	3.14
Availability of bike rental services	1.97	1.95
Charging options for e-bikes/pedelecs	1.91	1.84

How did you plan your cycling holiday? (full sample)



1. Internet research

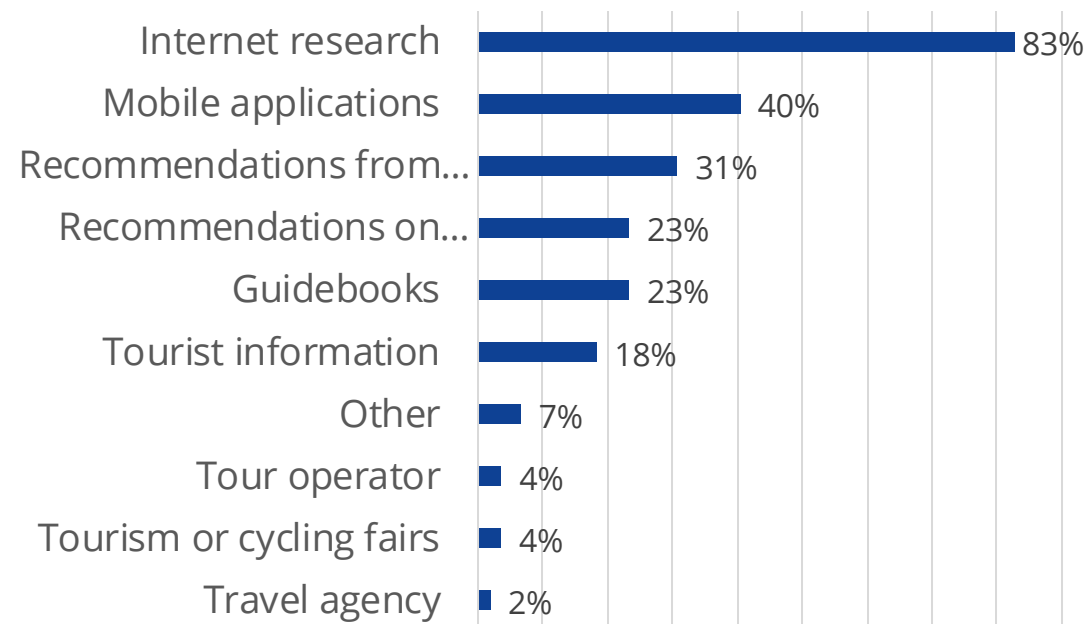


2. Mobile application



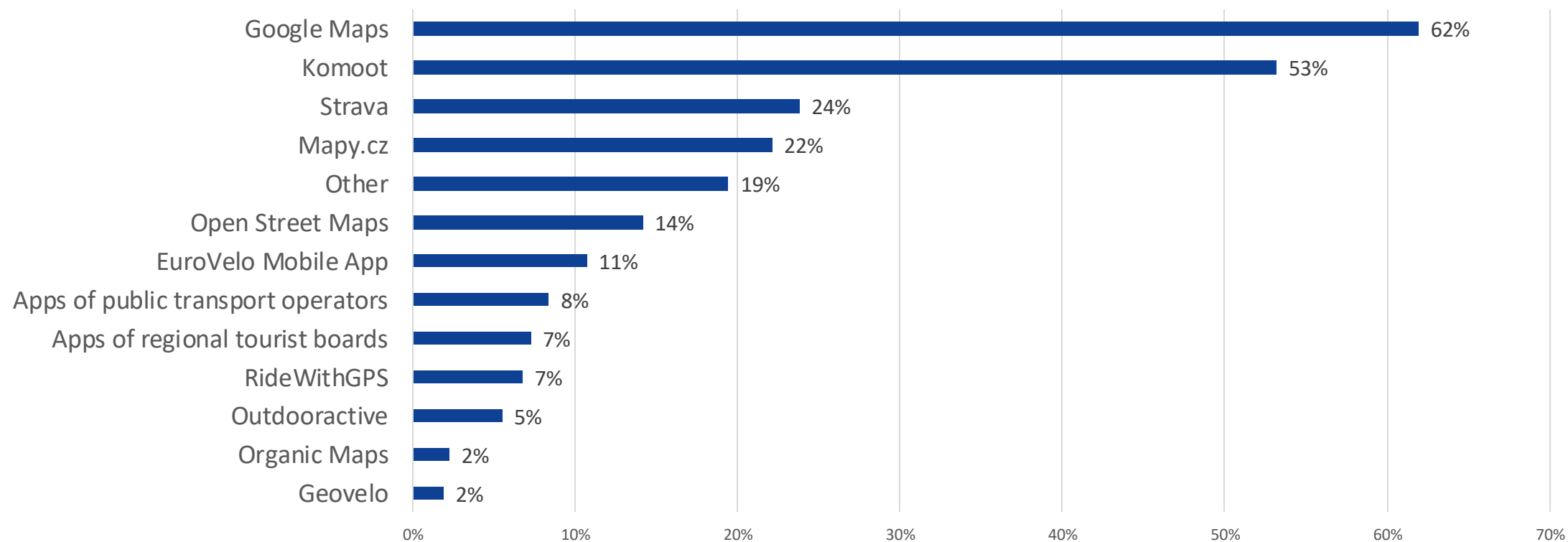
3. Recommendations from friends/family/colleagues etc.

How did you plan your cycling holiday? [multiple answers]



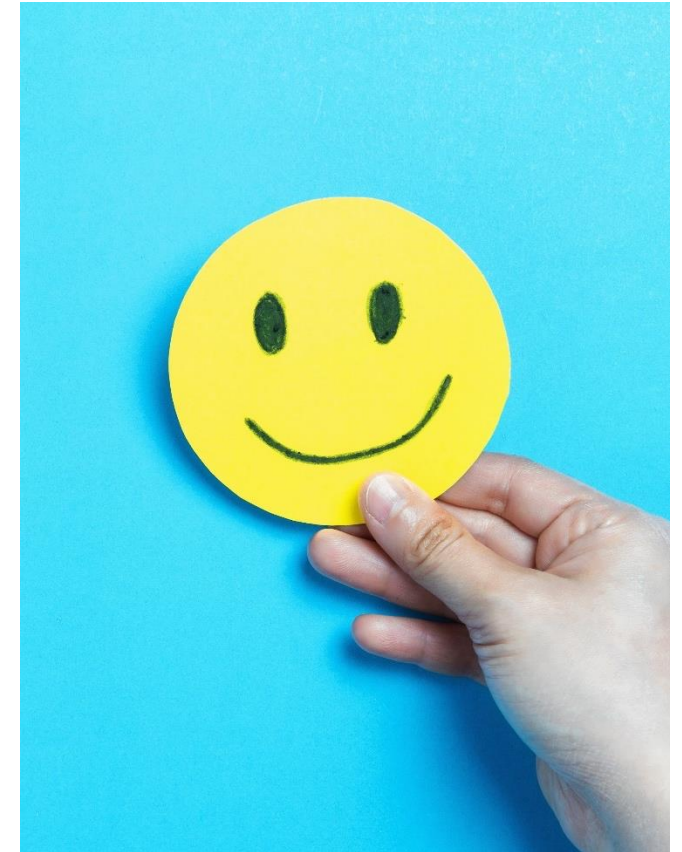
Mobile apps (full sample)

Which mobile application did you use to plan the itinerary of your cycling holiday?
[multiple answers]



Satisfaction with cycling holidays

- High overall satisfaction with the last cycling holiday: **4.6/5** (same value for full sample + visitors of Danube region + visitors to Slovenia)
 - Highest ranked: **gastronomic offer, accommodation options, cycling infrastructure**
- An overwhelming majority would go on a cycling holiday again (96% full sample, 95% visitors of Danube region, 100% Visitors to Slovenia)



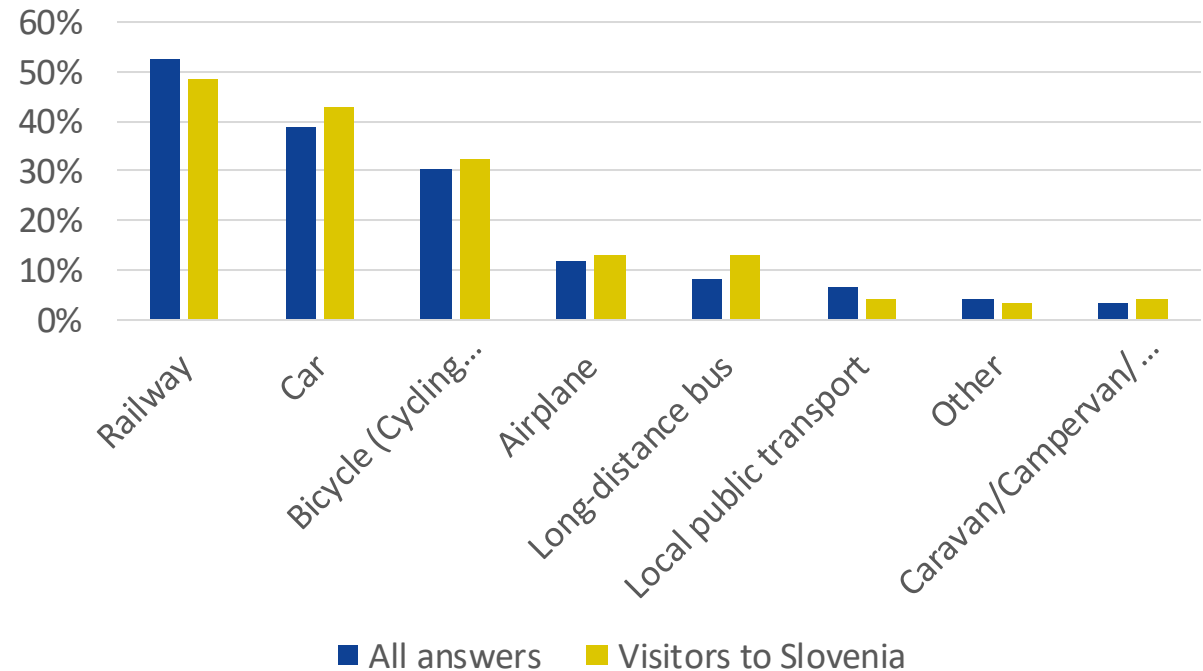
Use of Public Transport

- Public transport, and especially railways, are an **important means of transport** for reaching/departing the start/end point of cycling holidays

→ **67% of respondents used PT (66% Visitors to Slovenia)**

- A significant share of respondents also used PT **during their cycling holiday** (apart from the journey to the start/end point) (35% of all respondents, 38% visitors to Slovenia)

Which modes of transport did you use for traveling to/from the starting/end point of your last cycling holiday?
[multiple answers]



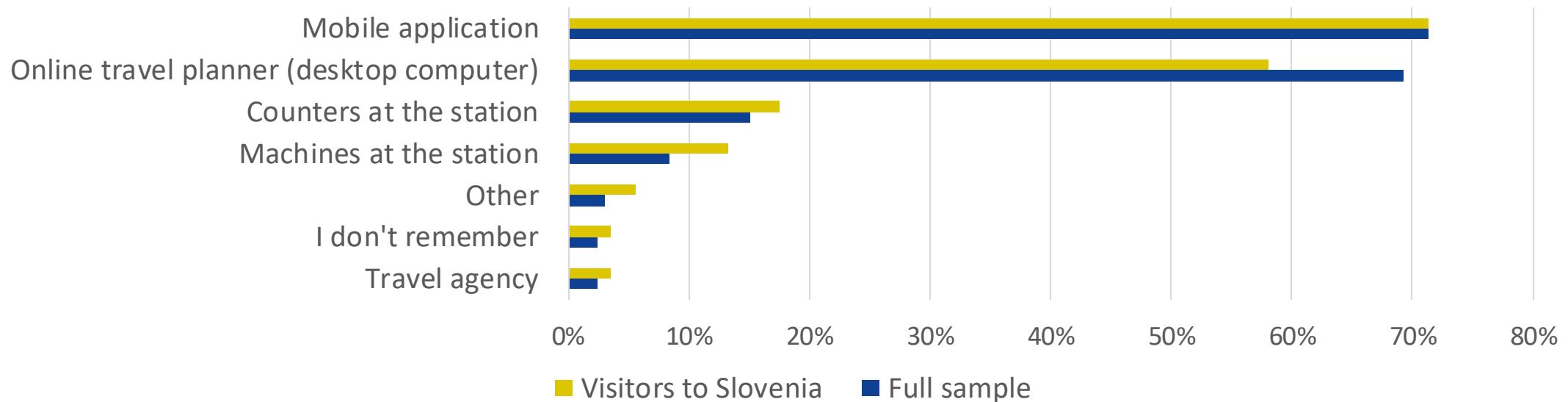
Use of Public Transport

- Most important criteria for choosing the mode of transport are the **price, duration of the journey and convenience/comfort**
- The majority of PT users **took their bike with them** (75% of all respondents & visitors to Slovenia)
- The majority of all respondents is **planning to use PT on their next cycling holiday** (60% of all respondents, 55% Visitors to the Danube Region + Slovenia)

Sources of information on PT

- Most respondents used **online sources** for planning their public transport journey

Which source of information on public transport did you use to plan the journey to/from the starting point of your cycling holiday?



Public transport: Satisfaction

- Satisfaction with public transport-related aspects is **noticeably lower** than overall satisfaction with cycling holidays (4.6/5):
 - Overall experience with PT stations: **3.3/5** (same for full sample + Danube region visitors + visitors to Slovenia)
 - Taking one's bike on PT: **3.5/5** (same for full sample + Danube region visitors + visitors to Slovenia)





Satisfaction with specific aspects of public transport stations

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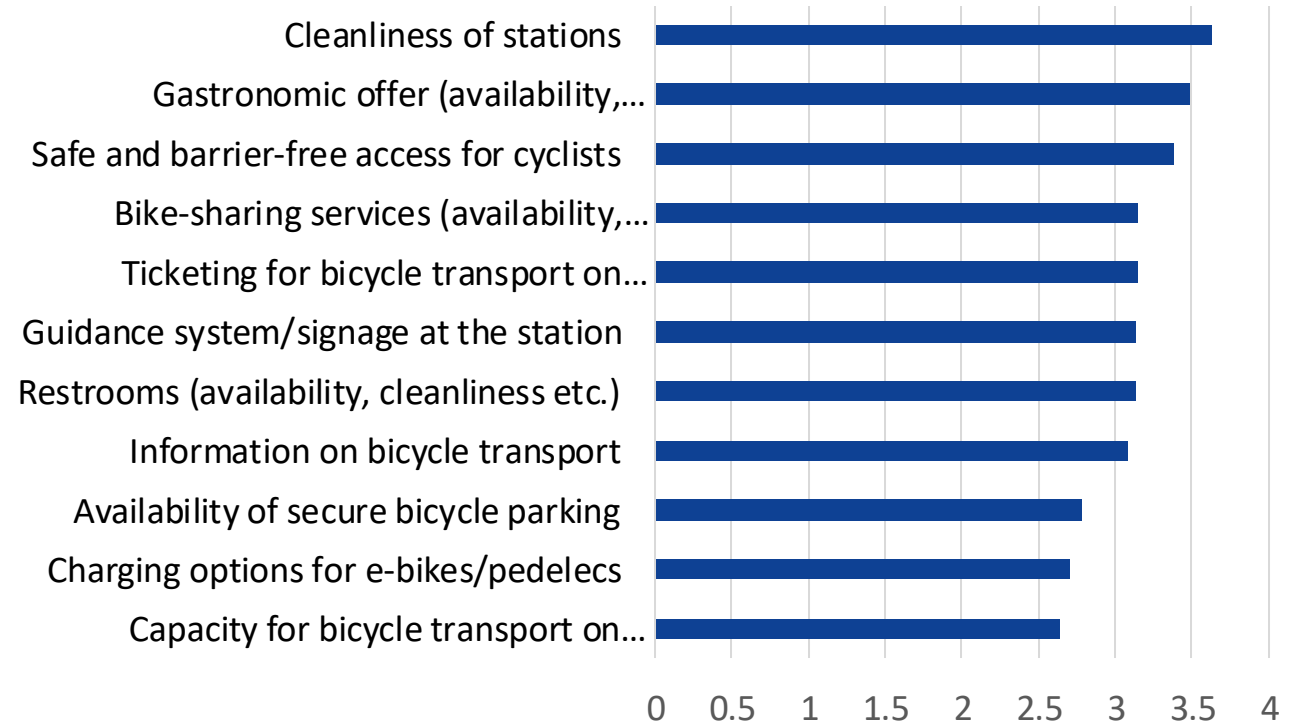


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- Especially low rated (same as full sample):
 - Capacity for bike transport on trains/buses
 - Charging options for e-bikes/pedelecs
 - Availability of secure bike parking

How satisfied were you with the following services at train/tram/bus stations? (visitors to Slovenia)



Areas needing most improvement

- Ranking of five most important areas needing improvement (same for all respondents, Danube region visitors and visitors to Slovenia):

All answers	Danube region visitors
1. Cycling infrastructure	1. Cycling infrastructure
2. Capacity for bicycle transport in trains/busses	2. Capacity for bicycle transport in trains/busses
3. Cycling-friendly public transport connections	3. Signage on bicycle routes
4. Signage on bicycle routes	4. Cycling-friendly public transport connections
5. Safe bicycle parking	5. Safe bicycle parking

Recommendations

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

Thank you for your attention

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