



The Danube Region Cycling Tourist Survey 2024

Background, sample and main results

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European Cyclists' Federation

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EUROPEAN CYCLISTS' FEDERATION

Background

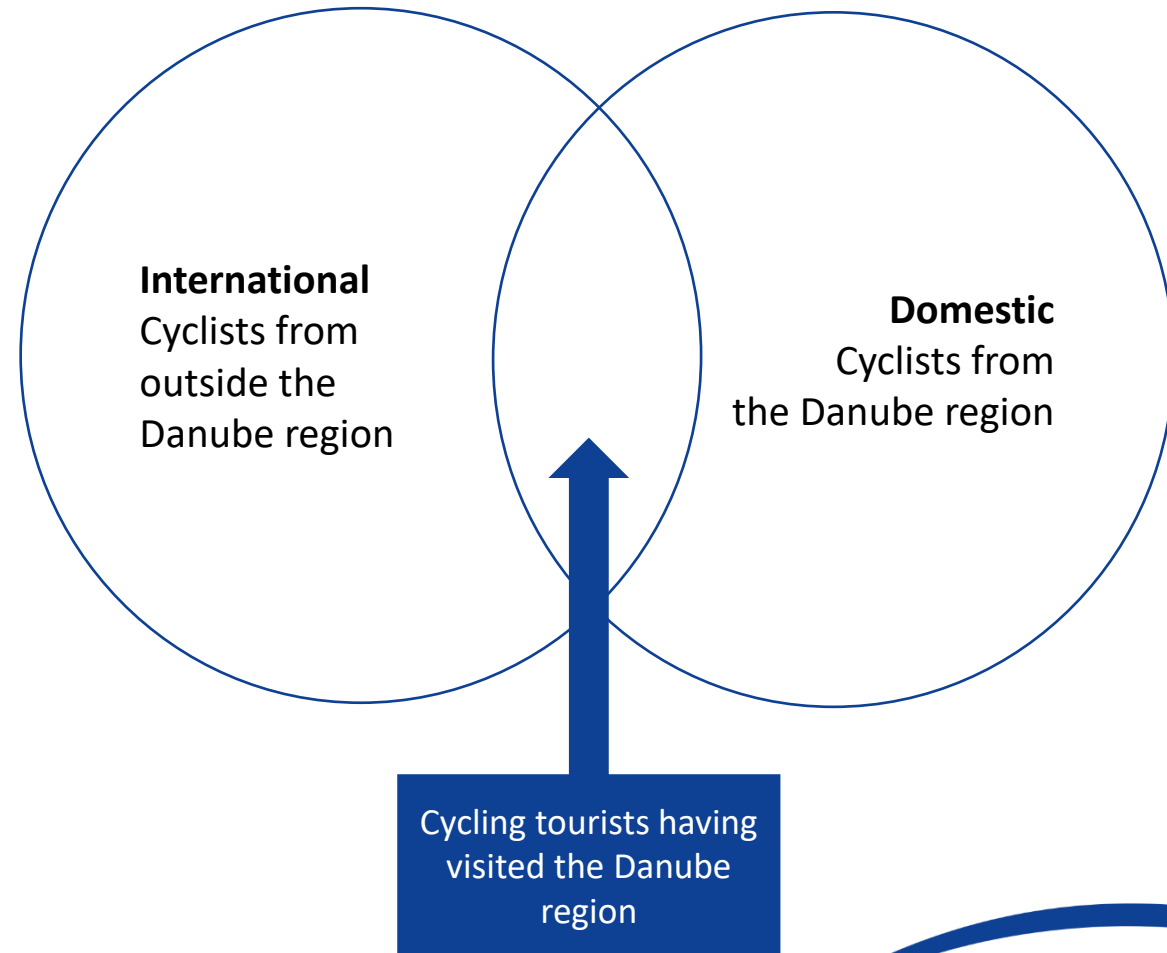
Background

- **Project activity:** Analysing the needs and challenges which cycling tourists face in the Danube region, especially regarding public transport
- **Aim:** Getting a better picture of cycling tourists in the Danube region
- **Implementation:** Conducting the “Danube Cycling Survey 2024”, with ECF as service provider
- **Survey period:** 18 September – 29 October 2024



Target groups + outreach

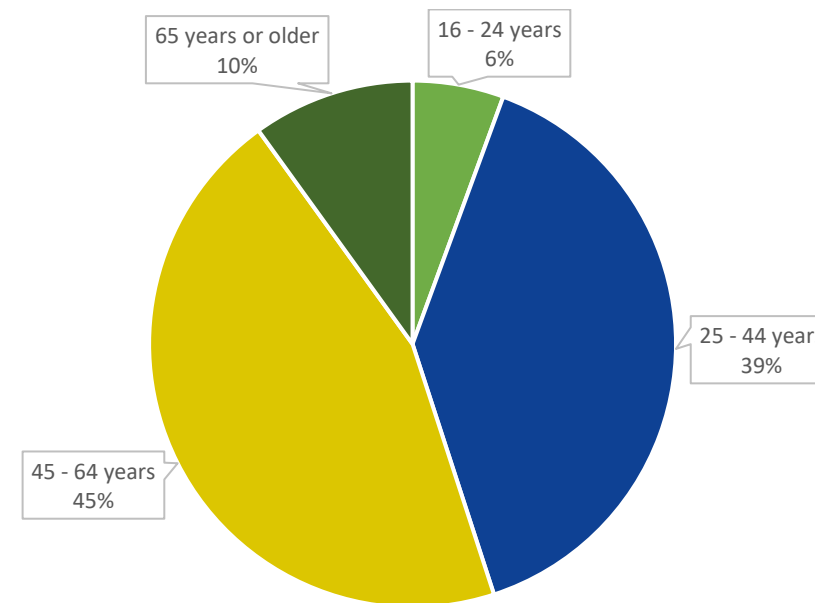
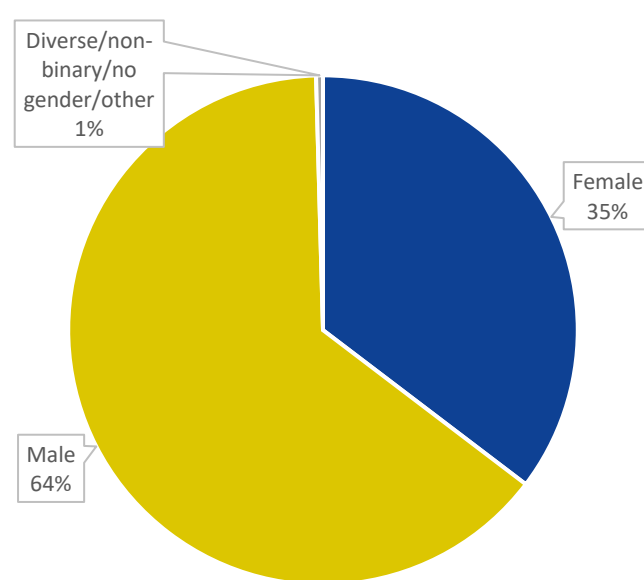
- Survey available in 14 languages
- Length: ca. 10 minutes
- Outreach channels:
 - Newsletters (EuroVelo, national/regional)
 - Social media ad campaigns
 - But also visual announcements on buses, posters at stations....



The Survey Sample: Demographics

The Survey Sample

- 5,053 completed responses (out of 7,584 in total)
- Demographics: overrepresentation of male respondents + middle age groups (25-64 years) compared to overall population



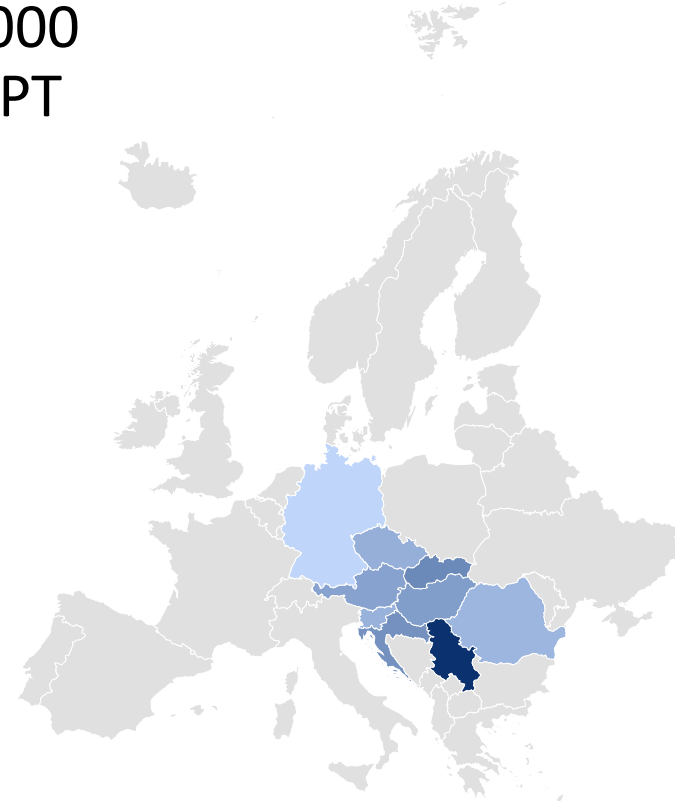
The Survey Sample

- Geographic distribution:
 - 96% of respondents live in Europe
 - 76% live in one of the partner countries in the Danube region

Answers per 100,000 inhabitants for A2PT partner countries:

Answers per 100,000 inhabitants
10,81130405

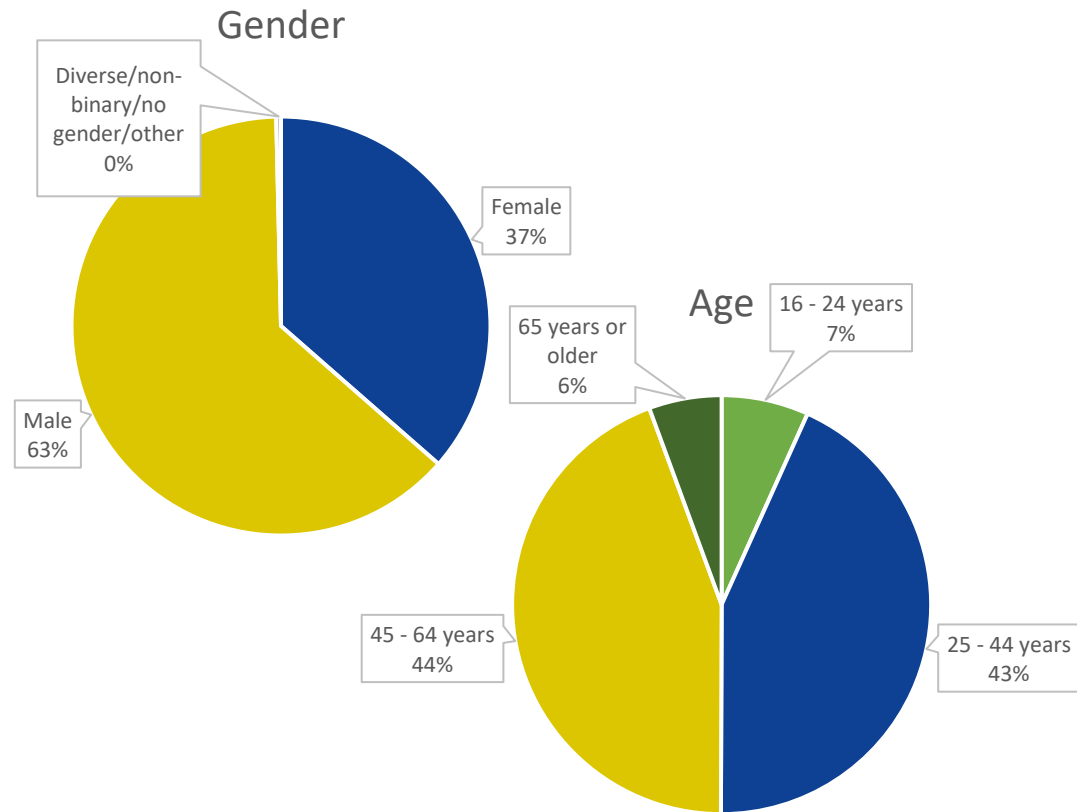
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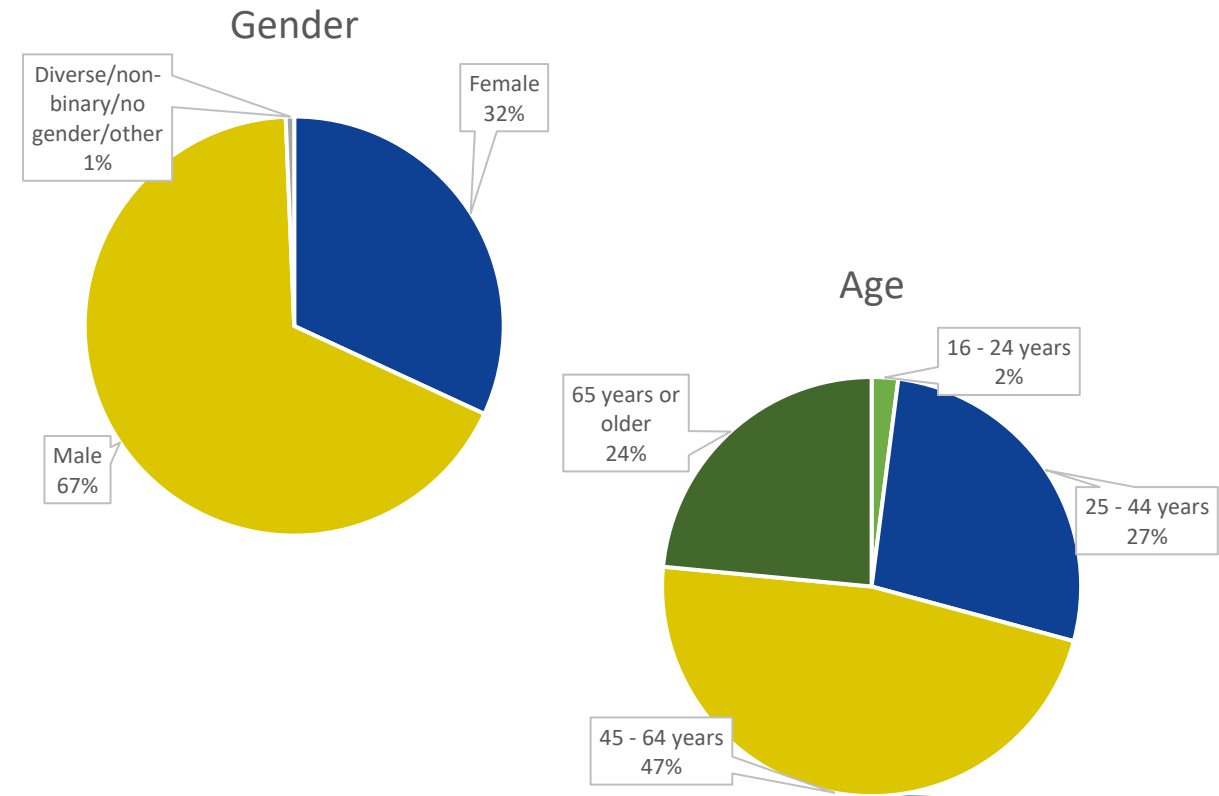
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The Survey Sample

Residents of Danube region

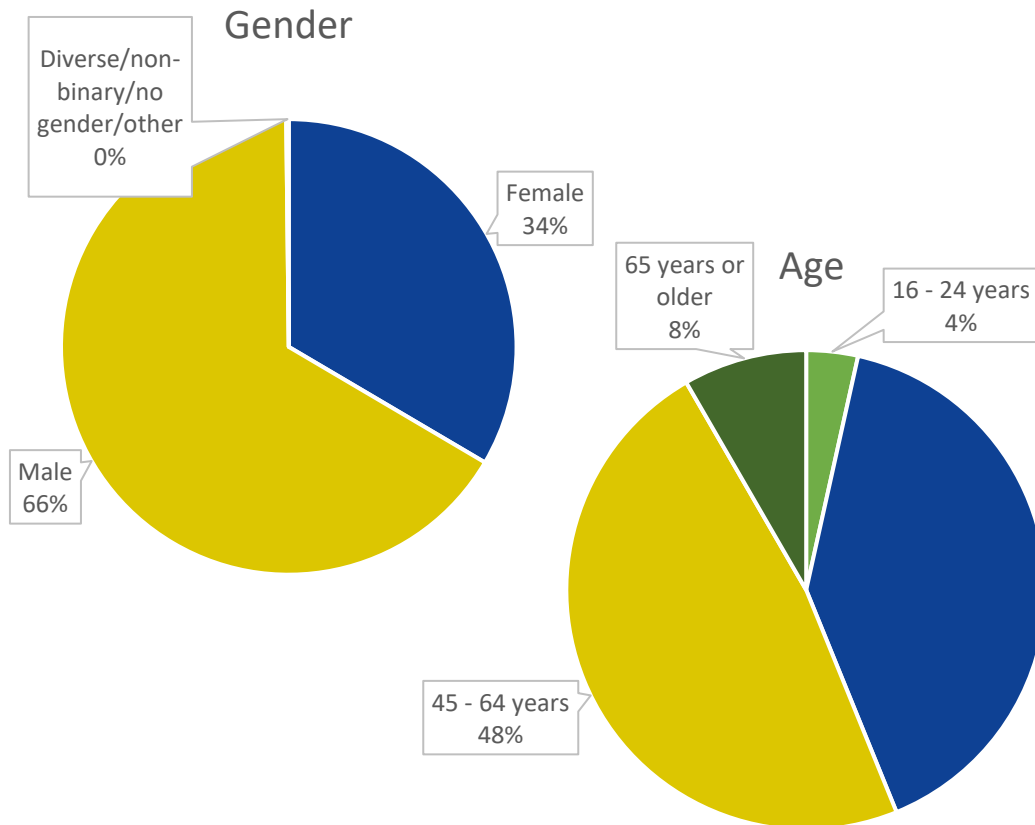


Residents outside of Danube region

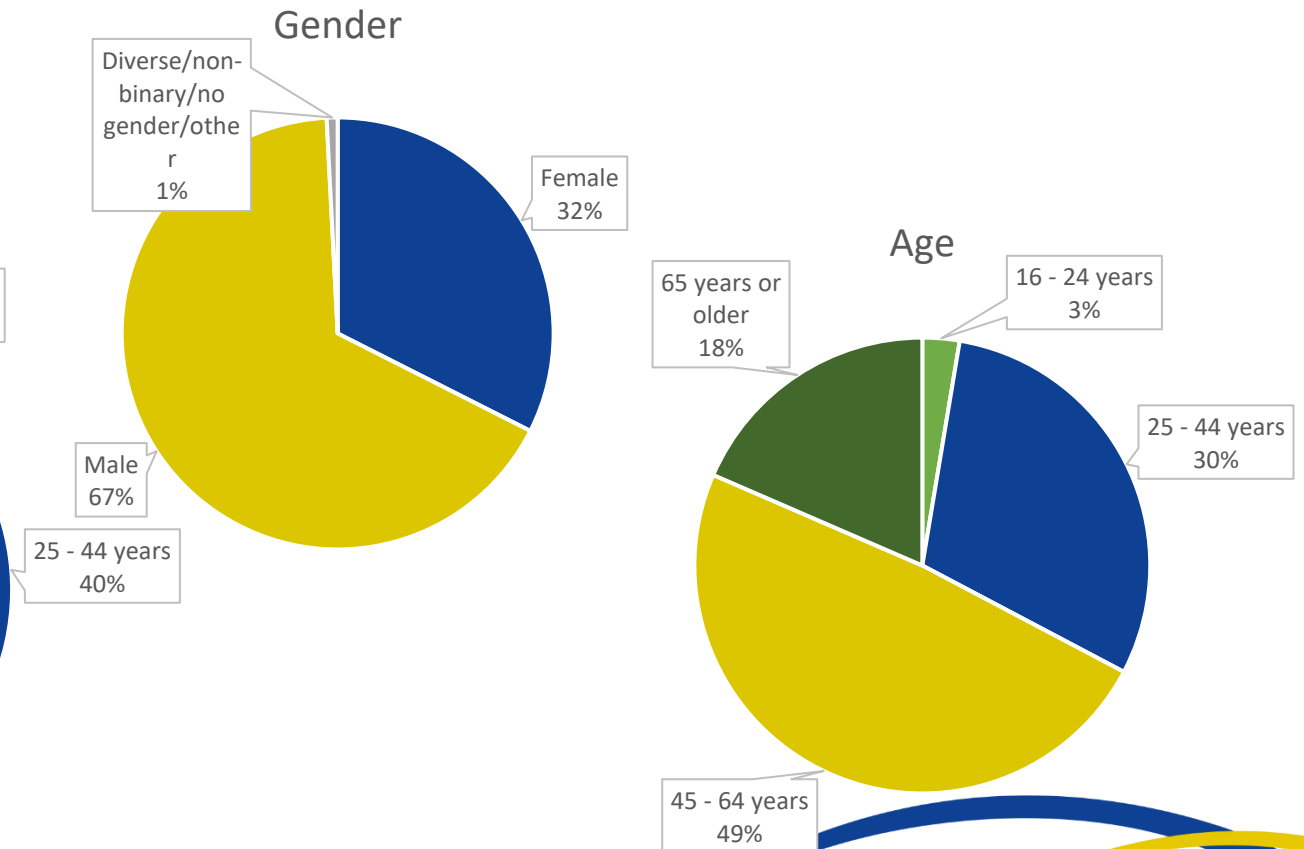


The Survey Sample

Visitors of Danube region



Cycling holidays outside of Danube



The Survey Sample

Gender	DE (BY+BW)	AT	CZ	SK	SI	HU	HR	RS	RO
Female	40.1%	47.1%	39.4%	35.0%	45.7%	33.5%	44.4%	34.0%	27.2%
Male	59.2%	52.0%	60.4%	64.7%	54.3%	65.8%	55.6%	65.9%	72.7%
Diverse	0.6%	0.9%	0.2%	0.3%	0.0%	0.6%	0.0%	0.1%	0.2%

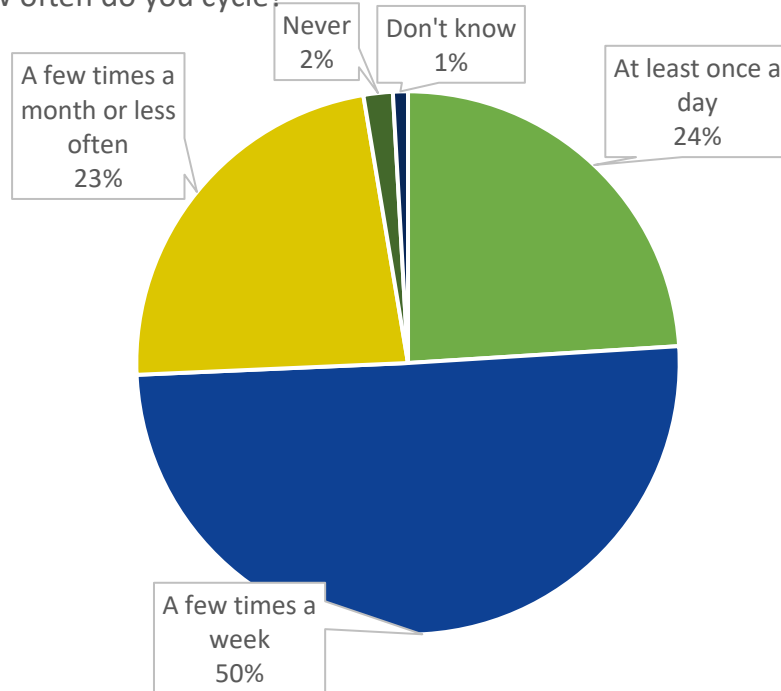
Age	DE (BY+BW)	AT	CZ	SK	SI	HU	HR	RS	RO
16 – 24	5.1%	3.3%	15.2%	2.4%	40.7%	2.9%	11.1%	4.3%	6.6%
25 – 44	40.6%	42.1%	36.8%	55.6%	30.9%	27.5%	37.5%	51.0%	50.4%
45 – 64	40.8%	48.2%	41.5%	37.7%	24.7%	61.8%	48.2%	41.5%	41.2%
65 or older	13.6%	6.4%	6.5%	4.3%	3.7%	7.8%	3.2%	3.2%	1.8%

Cycling Habits

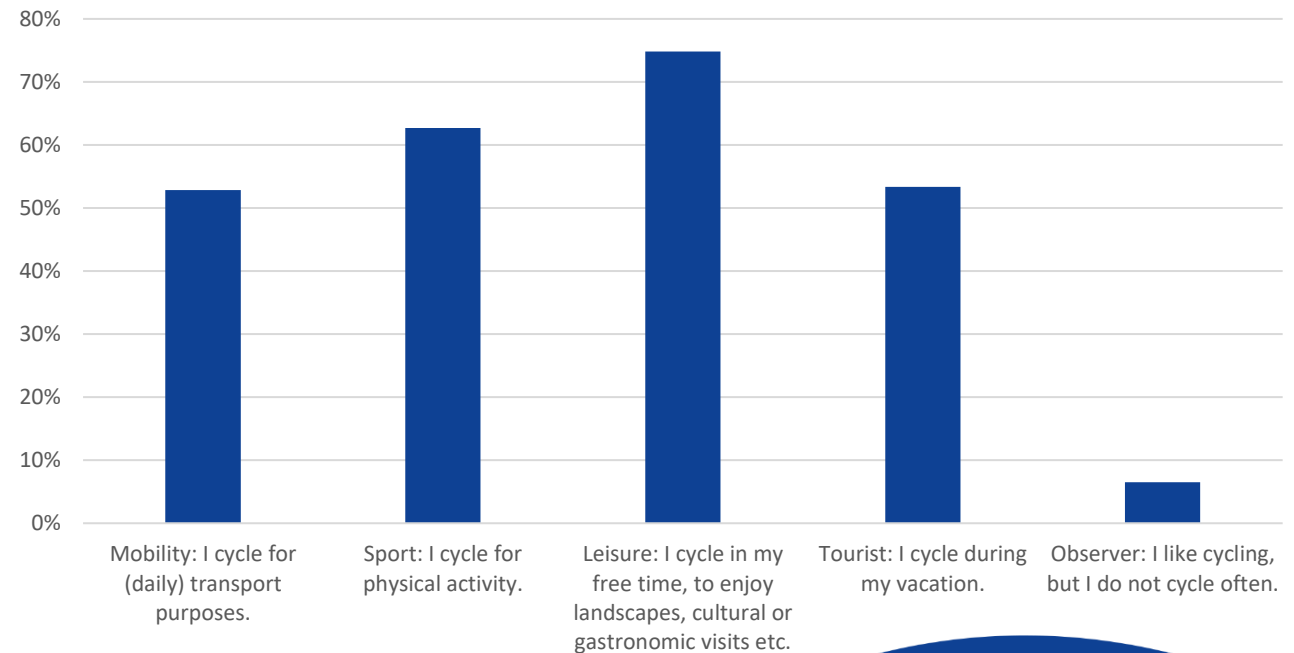
Cycling behaviour (full sample)

- Sample consists almost exclusively of people cycling at least occasionally, with a large majority cycling regularly (at least a few times a week)

How often do you cycle?



Which type of cyclist are you? [multiple answers]



Cycling behaviour

How often?	DE (BY+BW)	AT	CZ	SK	SI	HU	HR	RS	RO
At least once a day	32.7%	21.4%	11.2%	15.5%	12.4%	27.9%	20.8%	25.5%	17.3%
A few times a week	54.1%	56.2%	48.7%	53.2%	25.9%	49.1%	38.4%	48.6%	49.0%
A few times a month or less often	12.3%	20.1%	36.1%	29.8%	35.8%	21.8%	31.9%	24.1%	30.0%
Never	0.4%	0.9%	2.6%	1.2%	21.0%	0.9%	7.4%	1.1%	2.1%
Don't know	0.4%	0.5%	1.4%	0.3%	4.9%	0.4%	1.4%	0.7%	1.8%

Cycling behaviour

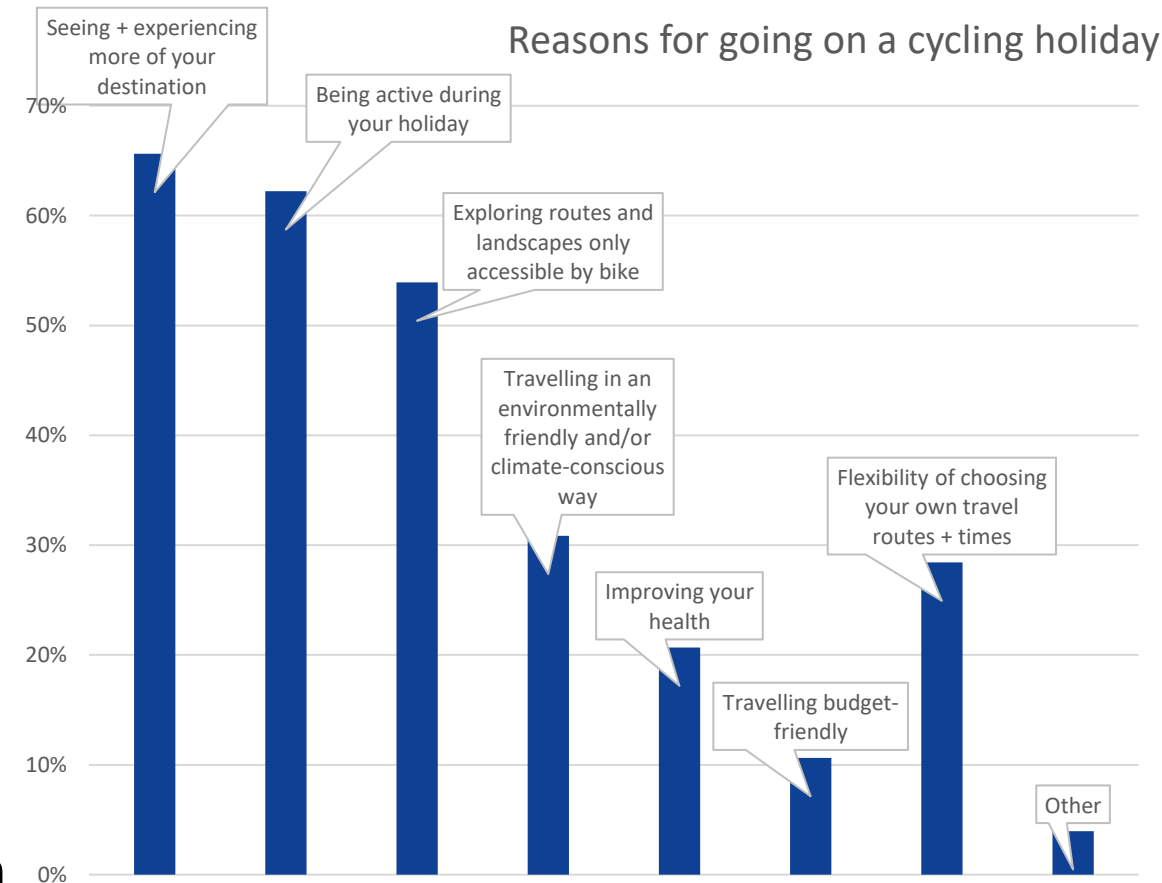


Type	DE (BY+BW)	AT	CZ	SK	SI	HU	HR	RS	RO
Mobility	75.3%	68.4%	41.9%	44.6%	40.6%	43.8%	43.5%	49.7%	36.0%
Sport	65.5%	67.5%	63.6%	66.5%	54.7%	65.8%	60.5%	51.7%	61.5%
Leisure	81.5%	73.9%	68.7%	77.5%	64.1%	77.4%	66.0%	72.7%	71.8%
Tourist	68.9%	66.5%	49.9%	39.4%	48.4%	40.1%	33.0%	22.8%	36.7%
Observer	2.6%	6.2%	13.0%	7.4%	26.6%	3.6%	12.5%	5.2%	12.1%

Cycling Holiday Habits

Familiarity with cycling holidays (full sample)

- **70% of respondents** have been on a cycling holiday already (cycling holiday: holiday away from home, with at least one overnight stay, which involves cycling as main activity during the holiday)
 - **Important differences** between project countries: from 38% of Serbian respondents to 82% of German respondents have been on a cycling holiday already
- **50% of respondents** have already been on a cycling holiday in the Danube region



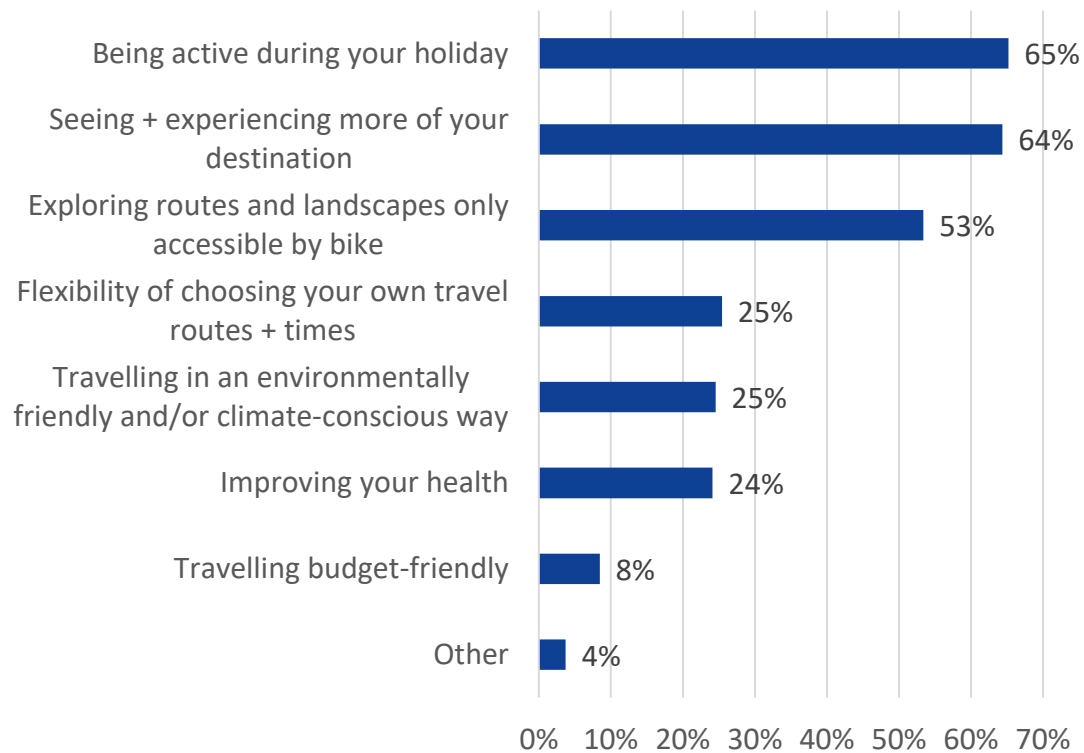
Familiarity with cycling holidays



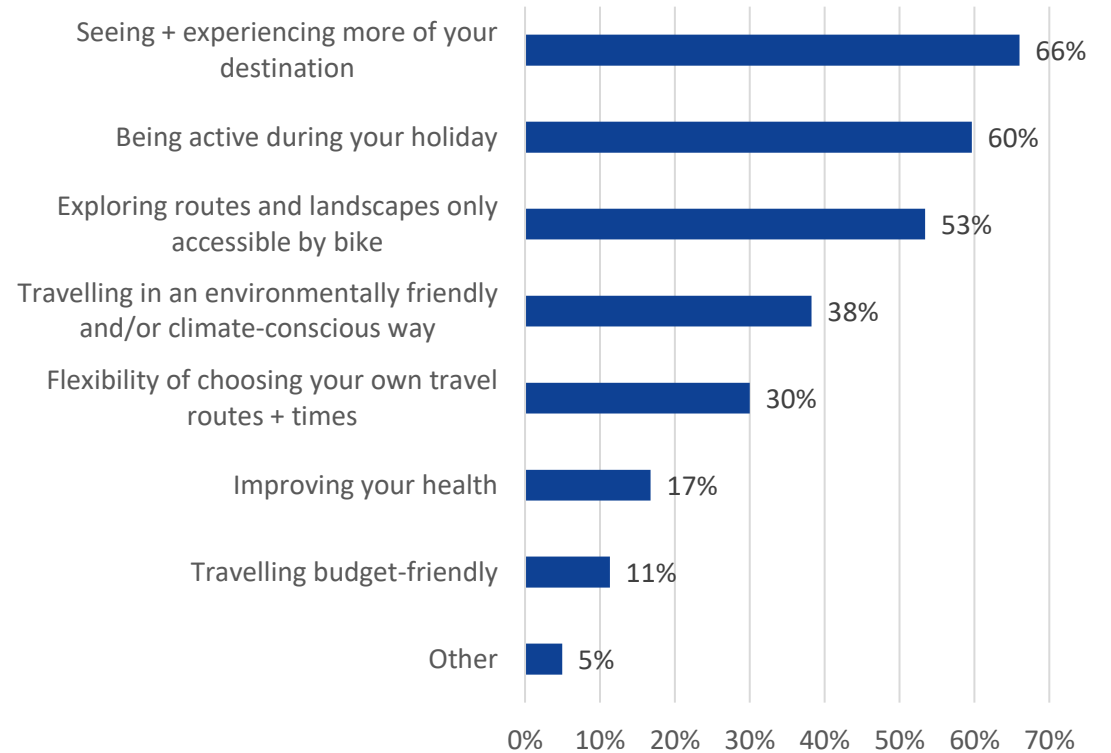
Ever been on a cycling holiday?	DE (BY+BW)	AT	CZ	SK	SI	HU	HR	RS	RO
Yes	81.7%	81.0%	80.2%	60.9%	46.9%	77.8%	45.5%	37.8%	56.9%
No	18.3%	19.0%	19.8%	39.1%	53.1%	22.2%	54.5%	62.3%	43.1%

Reasons for going on a cycling holiday

Visitors of Danube region

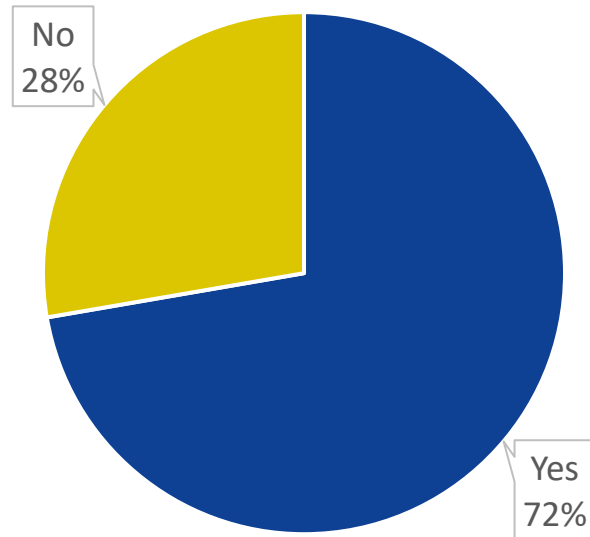


Cycling holidays outside Danube region

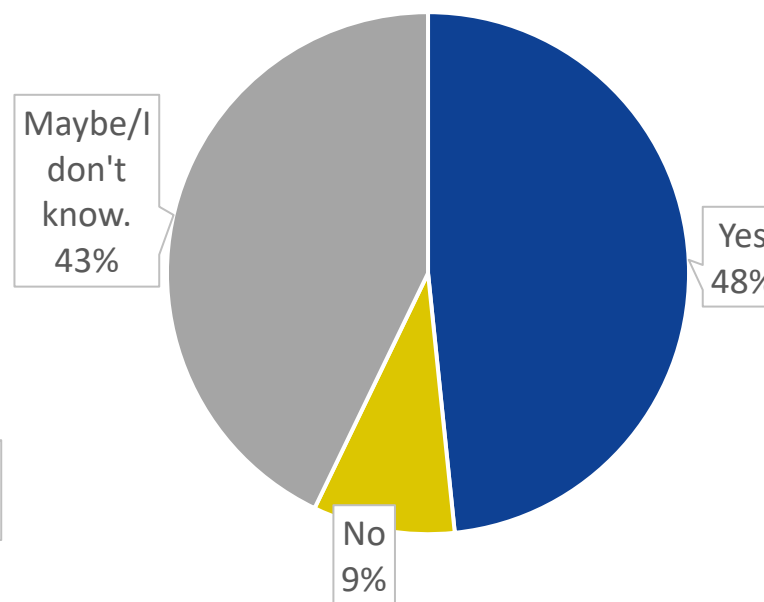


Cycling holidays in the Danube region

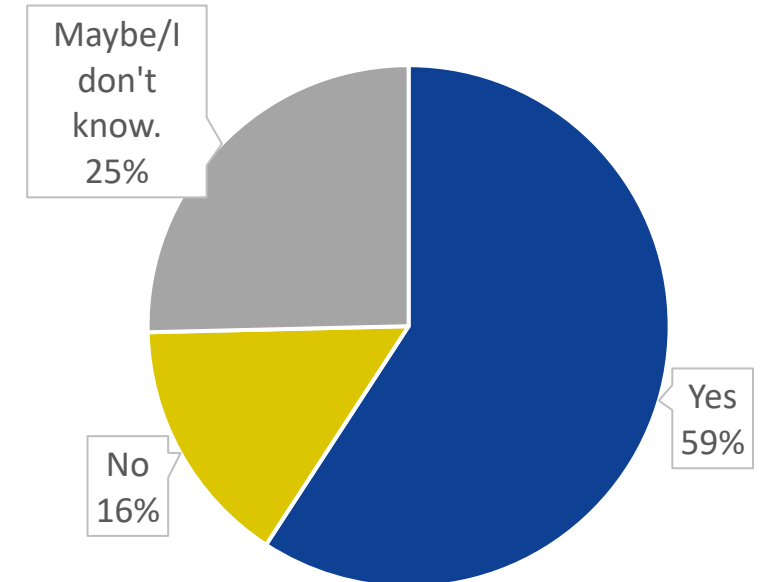
Have you ever been on a cycling holiday in the Danube region?
(n=3,529)



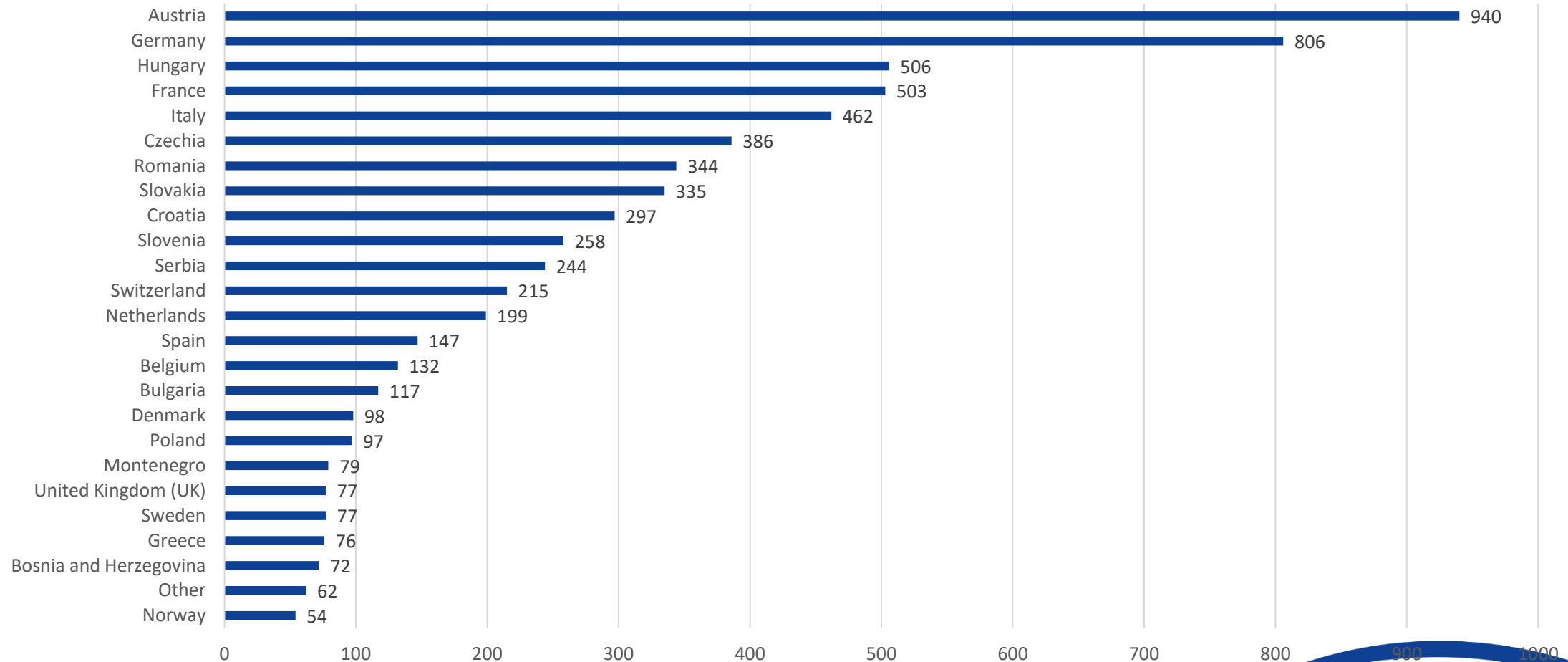
Do you plan to go on cycling holidays in the Danube region in the future?
(n=978)



Do you plan to use public transport on your future cycling holiday in the Danube region? (n=473)



25 most frequently named destinations



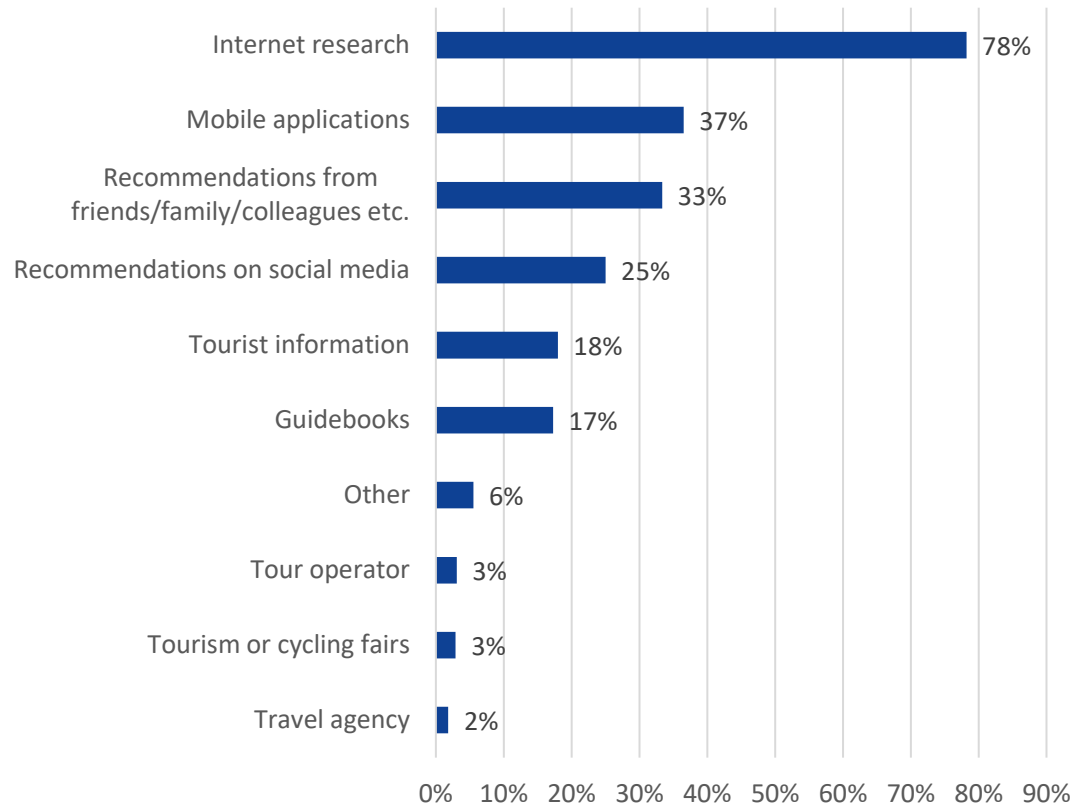
Duration of cycling holidays (nights)

	All answers	Visitors of Danube region	Cycling holidays outside Danube region
Average	13.5	6.3	17.6
Median	6	4	9

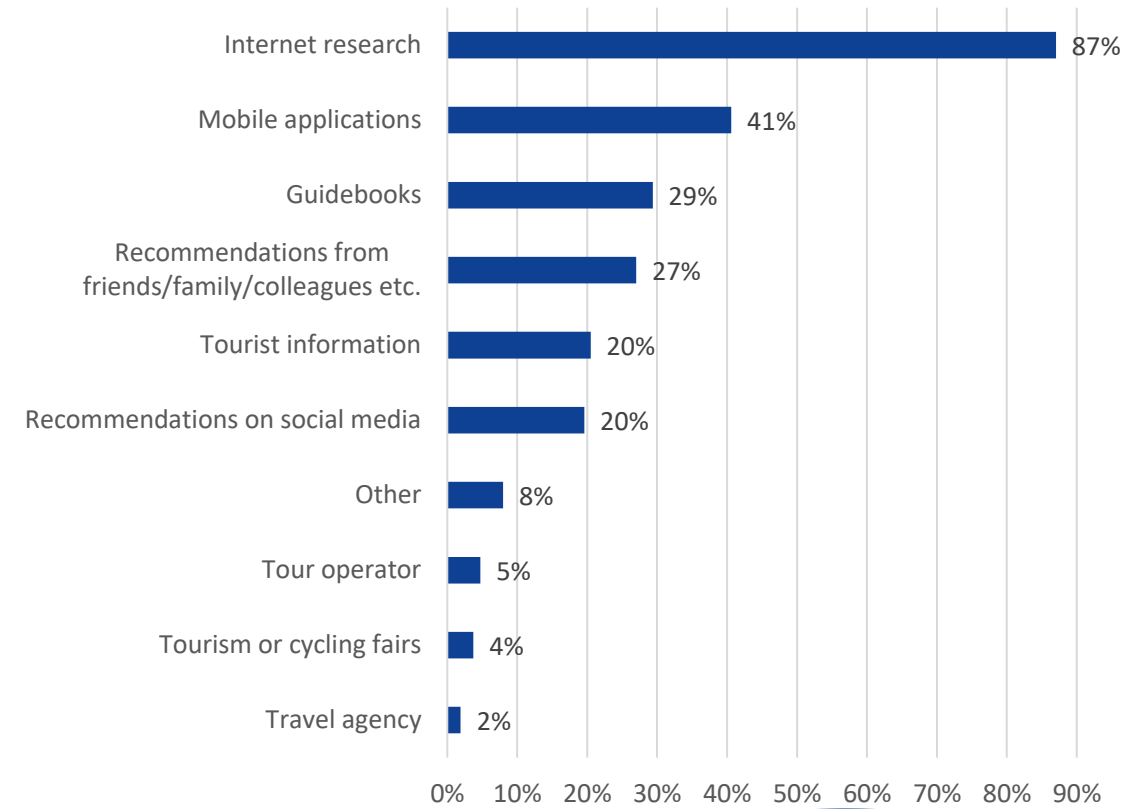
For comparison: ADFC Bicycle Travel Analysis: Average 4.4 nights

Planning of cycling holidays

Visitors of Danube region

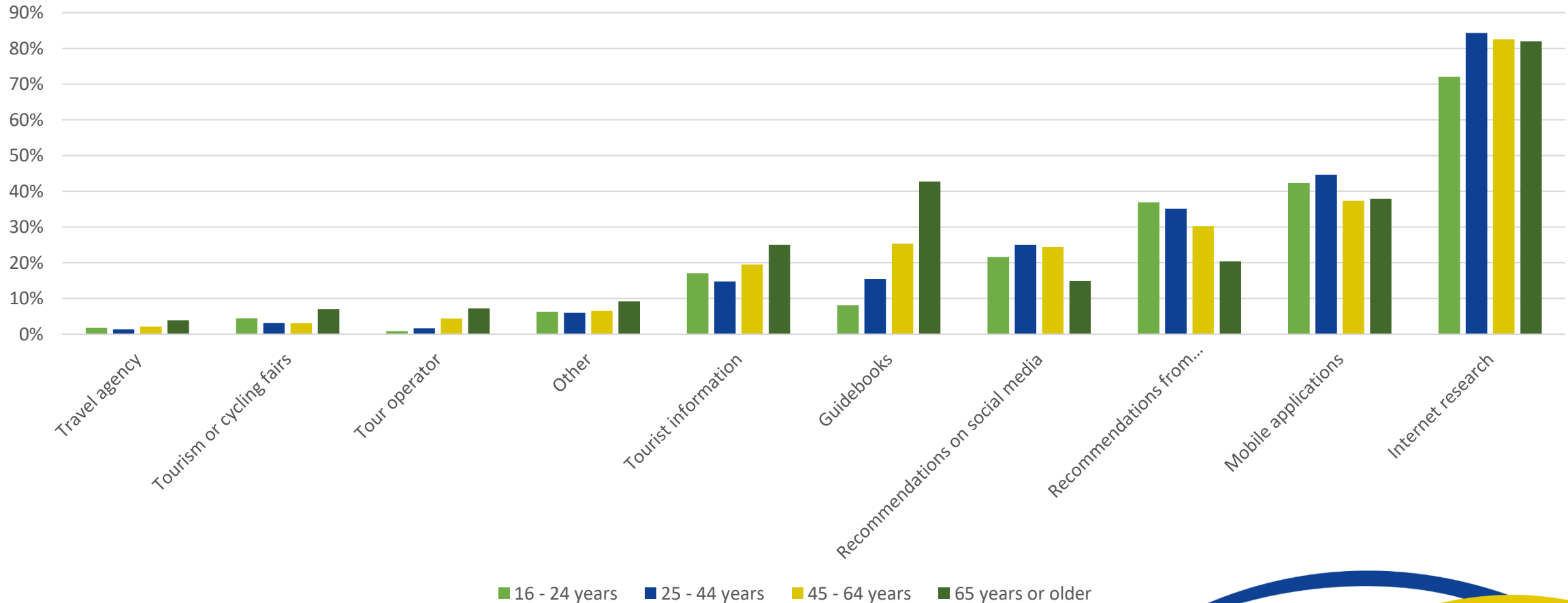


Cycling holidays outside of Danube region



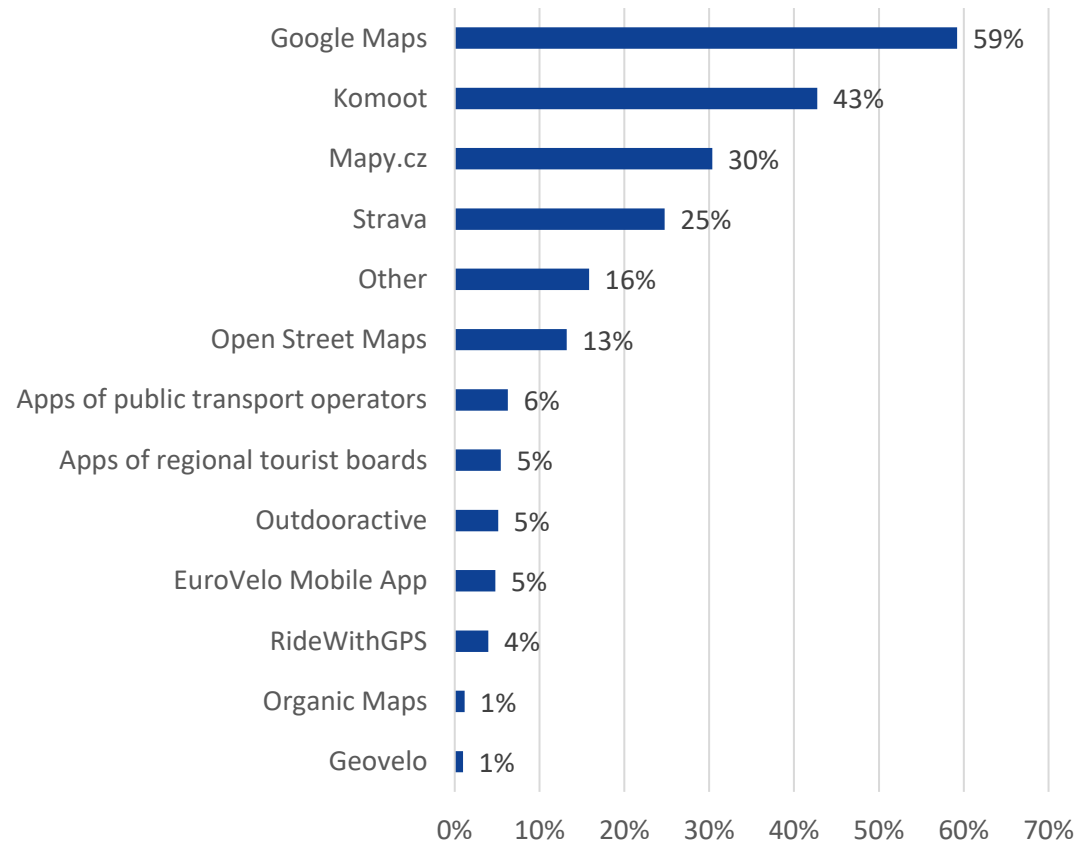
Planning of cycling holidays

Information sources on cycling holiday: age groups

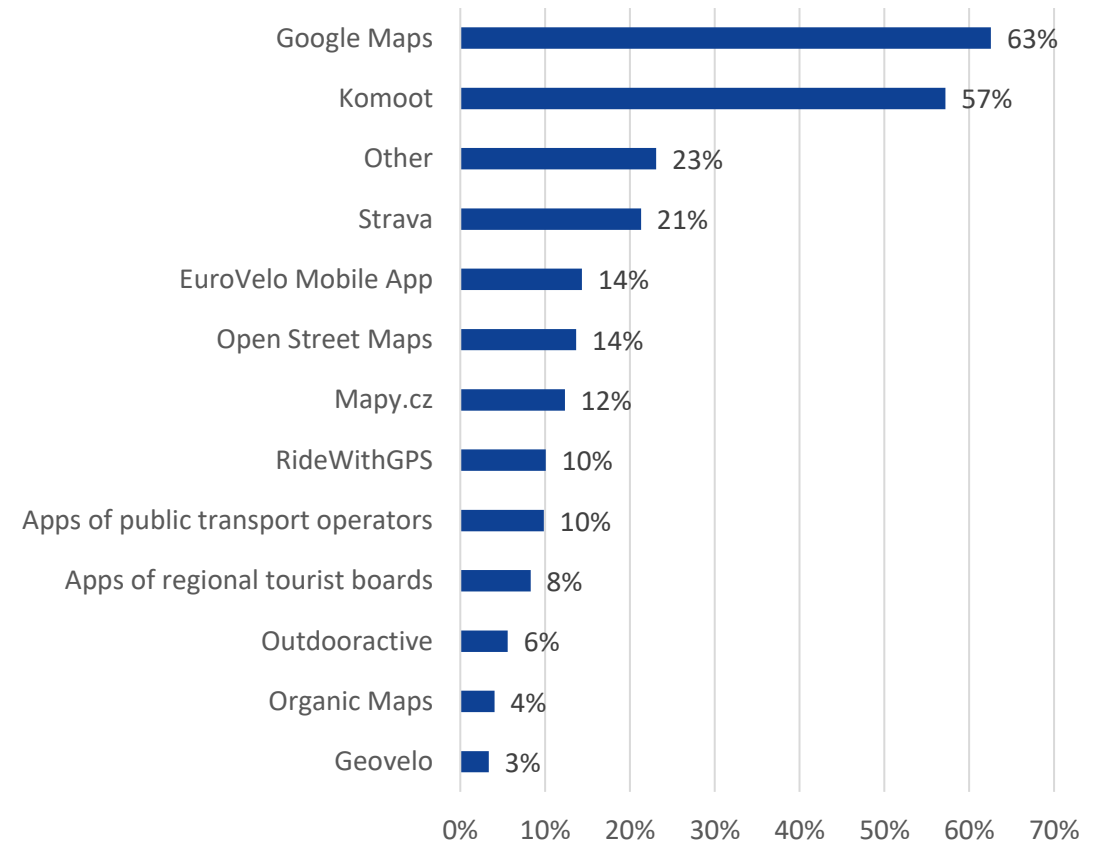


Use of mobile applications

Visitors of Danube region



Cycling holidays outside of Danube region



Use of mobile applications

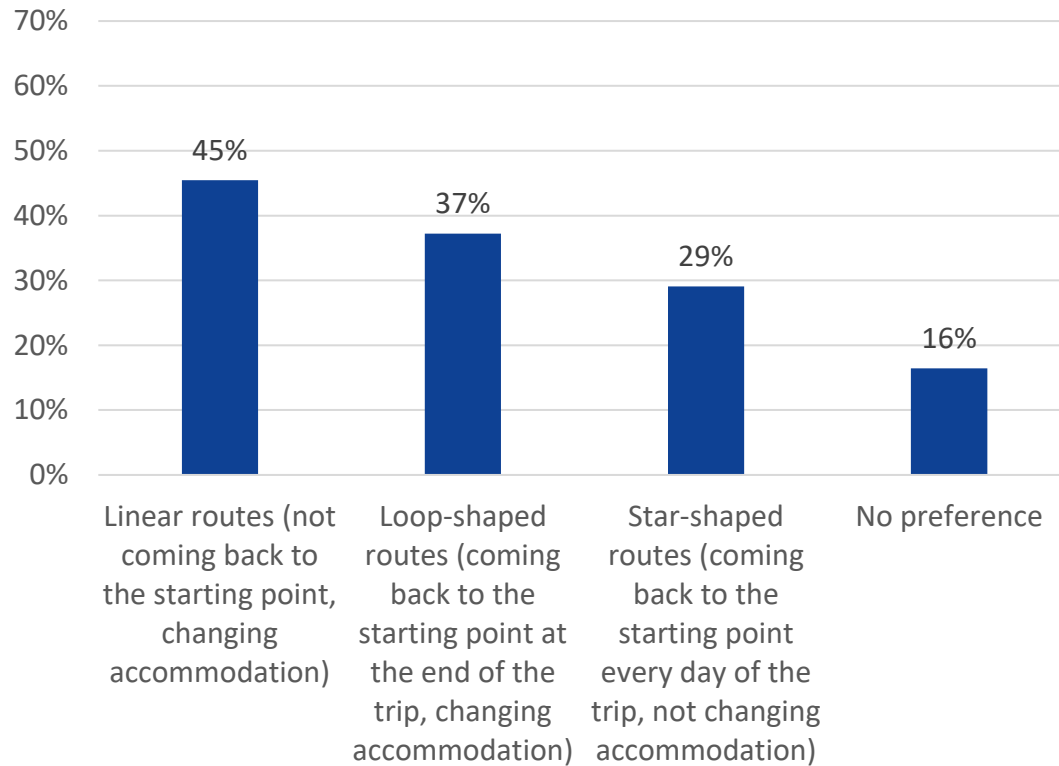
- For comparison: ADFC Bicycle Travel Analysis

	Tagesausflüge	Radfahren im Urlaub	Radreise 1-2 ÜN	Radreise 3 ÜN +
1.	Google Maps (70,0 %)	Google Maps (83,6 %)	Google Maps (75,1 %)	Komoot (81,3 %)
2.	Komoot (67,1 %)	Komoot (56,1 %)	Komoot (70,2 %)	Google Maps (68,9 %)
3.	Outdooractive (7,5 %)	Apps von Tourismusorganisationen (9,3 %)	Open Street Maps (10,5 %)	Open Street Maps (13,3 %)
4.	Strava (6,9 %)	Outdooractive (9,1 %)	Outdooractive (9,8 %)	Outdooractive (9,1 %)
5.	Apps von Verkehrsverbänden (3,2 %)	Open Street Maps (7,1 %)	Strava (8,3 %)	Strava (8,8 %)
6.	Regionale Apps von Tourismusorganisationen (3,1 %)	Strava (4,2 %)	Apps von Verkehrsverbänden (6,8 %)	Regionale Apps von Tourismusorganisationen (8,7 %)
7.		Apps von Verkehrsverbänden (3,4 %)	Regionale Apps von Tourismusorganisationen (5,0 %)	Apps von Verkehrsverbänden (6,6 %)
8.	Sonstiges (15,6 %)	Sonstiges (7,6 %)	Sonstiges (10,4 %)	Sonstiges (13,0 %)

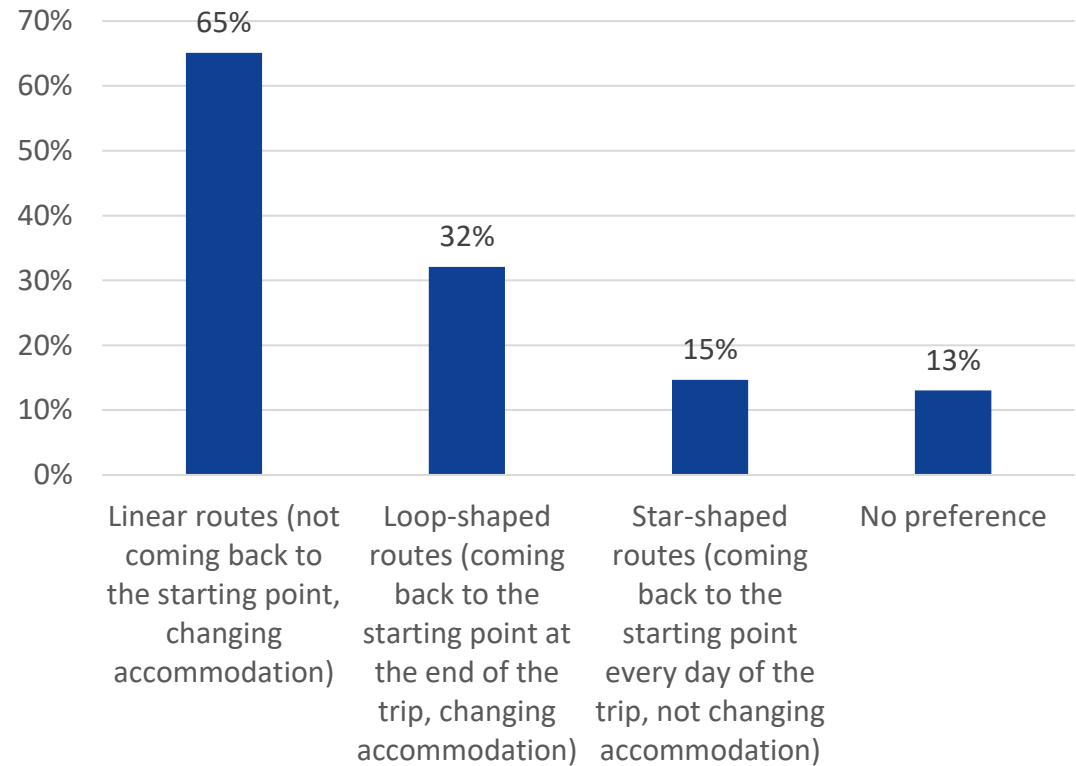
Bezug: Tagesausflügler:innen, nur App-Nutzer; n = 6.774 ; Personen, die im Urlaub Rad gefahren sind, nur Nutzer:innen von Apps; n = 2.642 ; Radreisende 2021/22/23; n = 4.460 (Mehrfachnennungen bei allen)

Preferred route types

Visitors of Danube region



Cycling holidays outside of Danube region



Importance of specific criteria for cycling holidays

	Visitors of Danube region	Cycling holidays outside Danube region
Dedicated cycling infrastructure available	4.24	4.13
GPX tracks of the route easily accessible online	3.11	3.14
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
Charging options for e-bikes/pedelecs	1.91	1.84
Possibility to carry my bicycle on public transport.	3.56	3.87
Availability of bike rental services	1.97	1.95

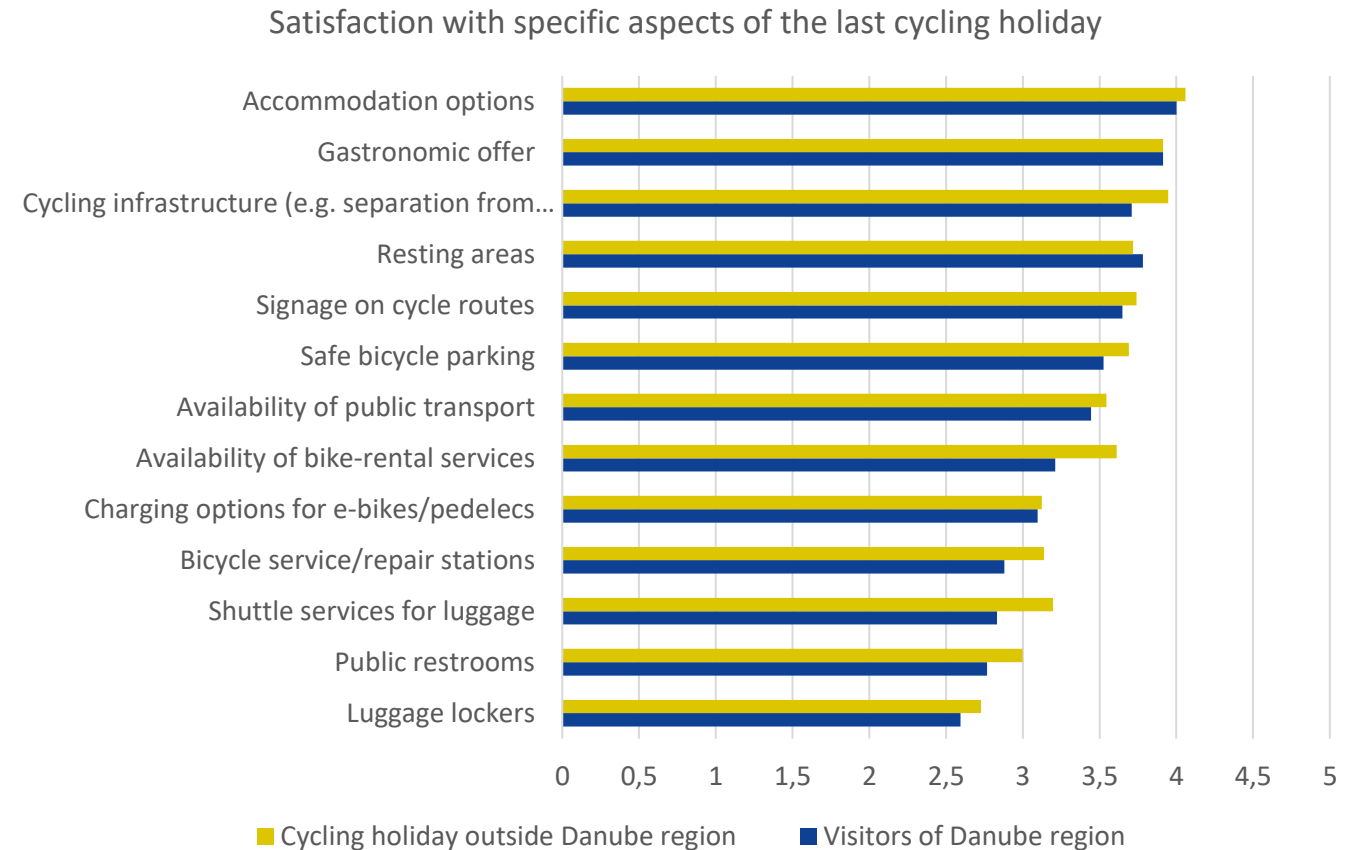
Bicycles used



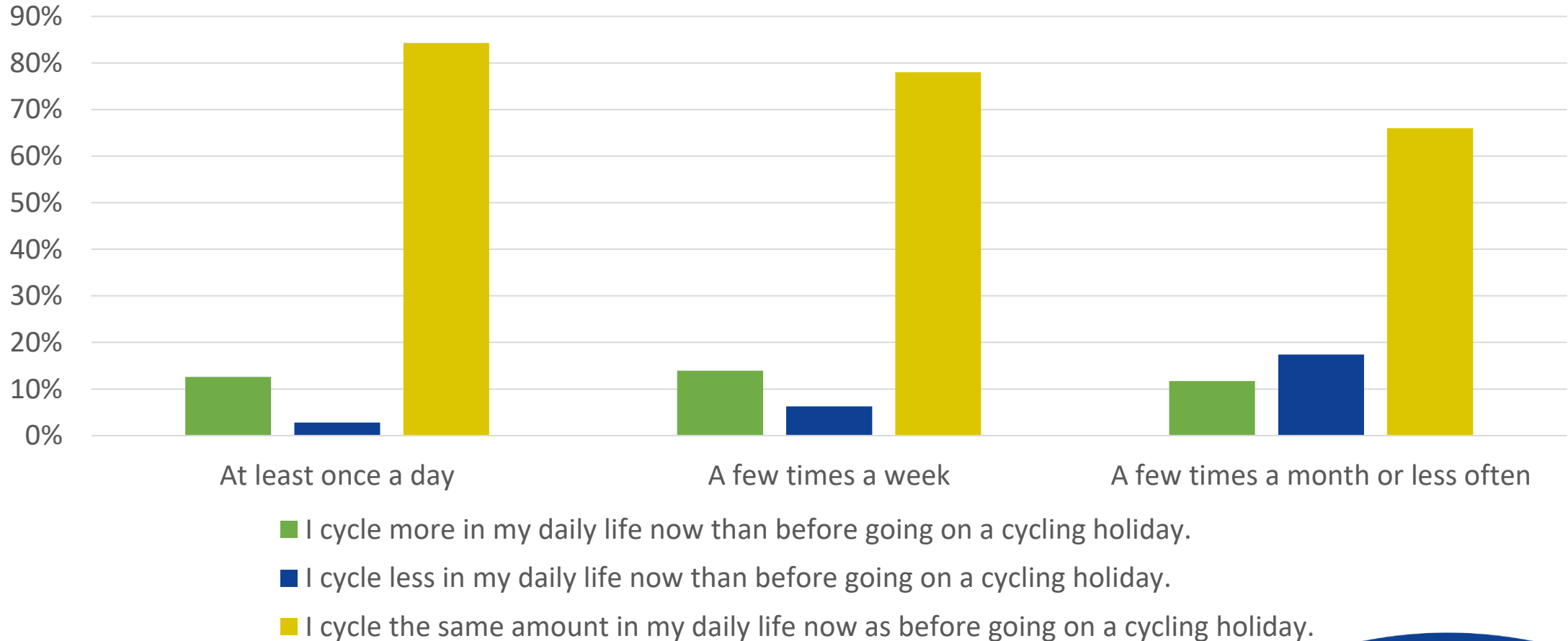
	Visitors of Danube region	Cycling holidays outside Danube region
Own bike	91.8%	89.5%
Electric bike	18.6%	16.7%

Satisfaction with cycling holidays

- Average overall satisfaction with the last cycling holiday: 4.6/5 (same value for full sample + visitors of Danube region)
- An overwhelming majority would go on a cycling holiday again (96% full sample, 95% visitors of Danube region)



Influence of cycling holidays on everyday cycling

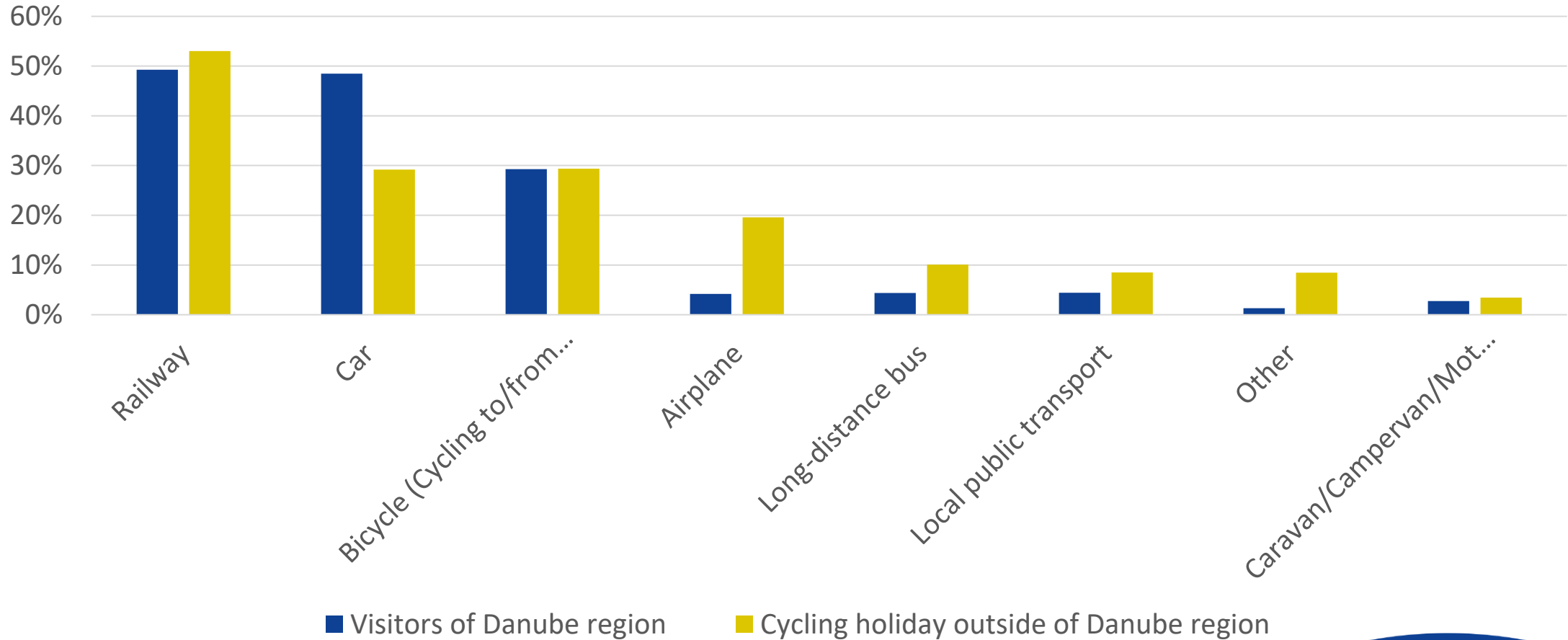


Use of Public Transport

Public transport: Use

- Public transport, and especially railways, are an important means of reaching/departing the start/end point of cycling holidays for respondents
- 35% of all respondents stated that they used PT also during their cycling holiday (apart from the journey to the start/end point)
 - Danube region visitors: 27%
 - Last cycling holiday outside of Danube region: 40%
- 75% of all respondents using PT took their bike with them
 - Danube region visitors: 71%
 - Last cycling holiday outside of Danube region: 80%
- 60% of all respondents wanting to go on a cycling holiday again plan to use PT
 - Danube region visitors: 55%
 - Last cycling holiday outside of Danube region: 64.3%

Mode of transport used to reach/depart destination

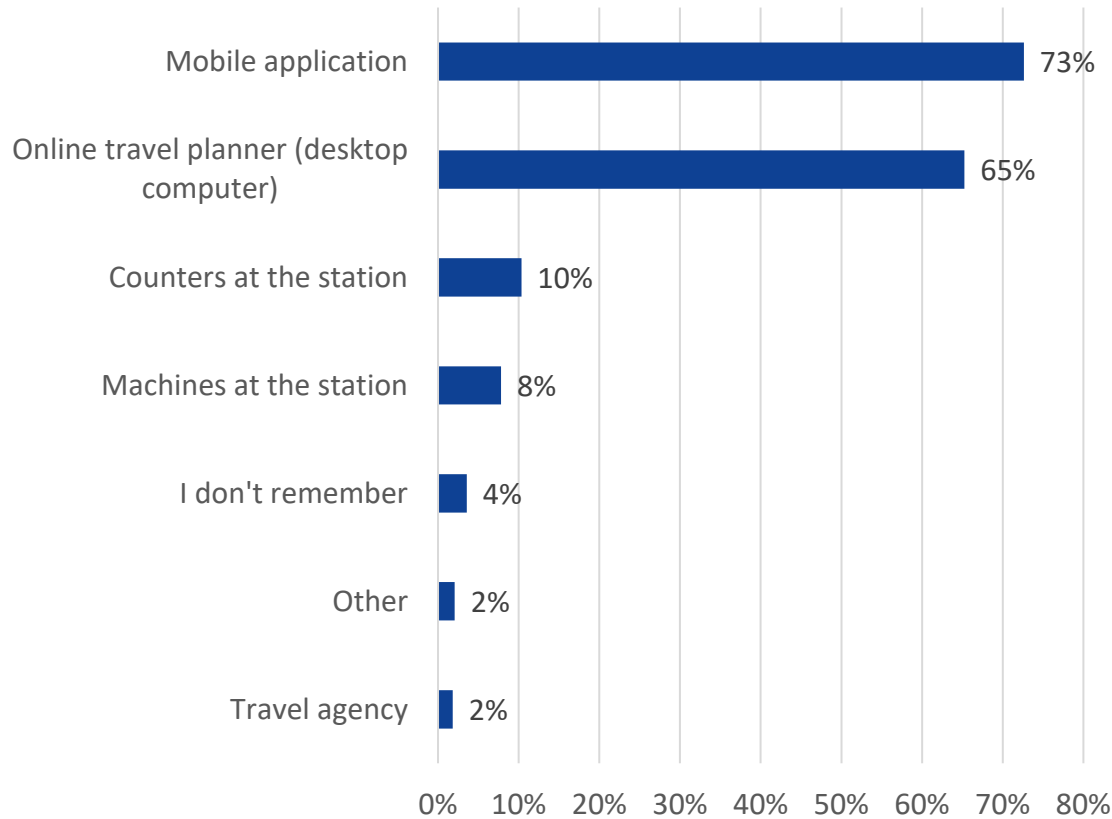


Importance of specific criteria for choosing modes of transport

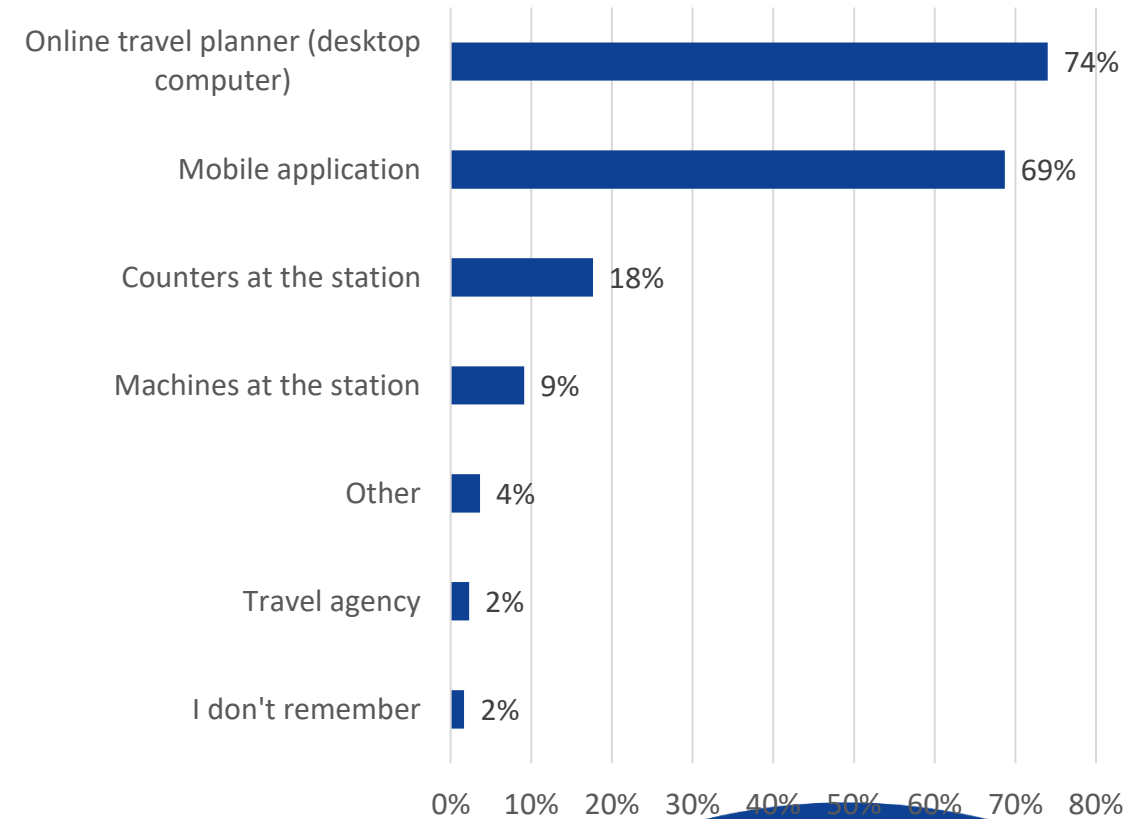
	Visitors of Danube region	Cycling holidays outside Danube region
Price	3.37	3.34
Duration of the journey	3.39	3.30
Convenience/comfort	3.39	3.36
Sustainability	3.18	3.29
Cancellation option	2.94	2.67

Information sources on PT for journey to/from start/end point

Visitors of Danube region

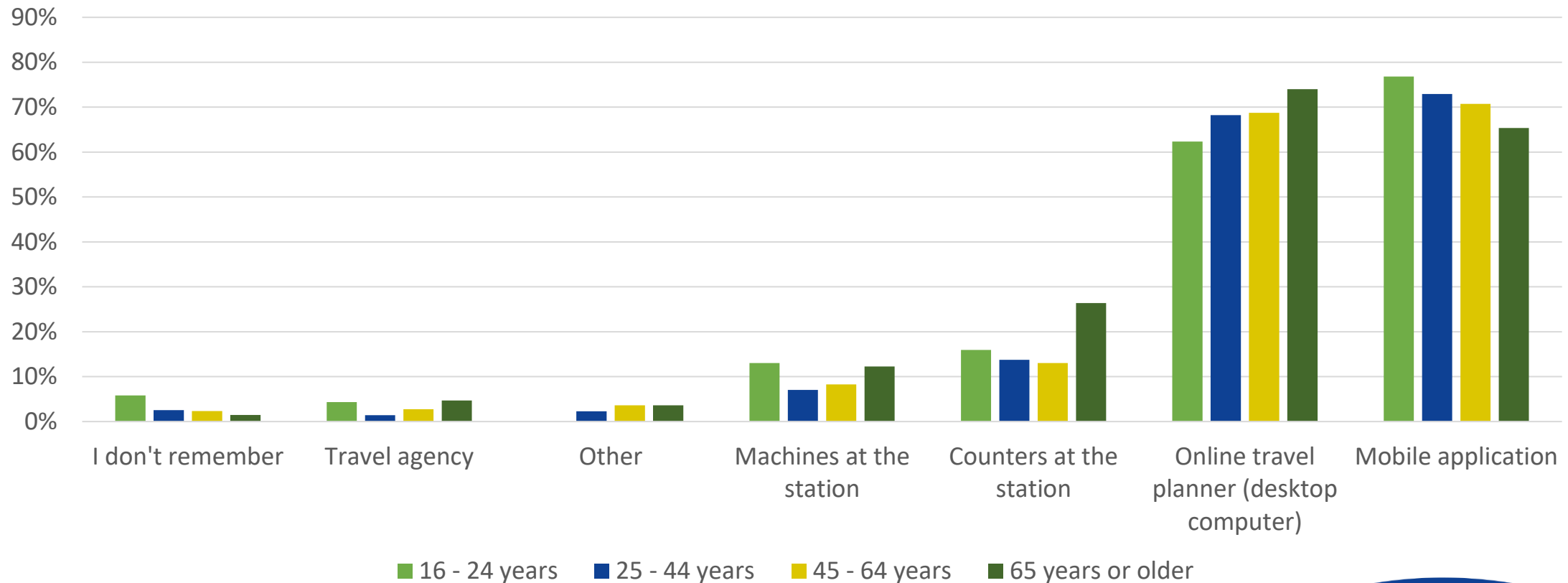


Cycling holidays outside of Danube region



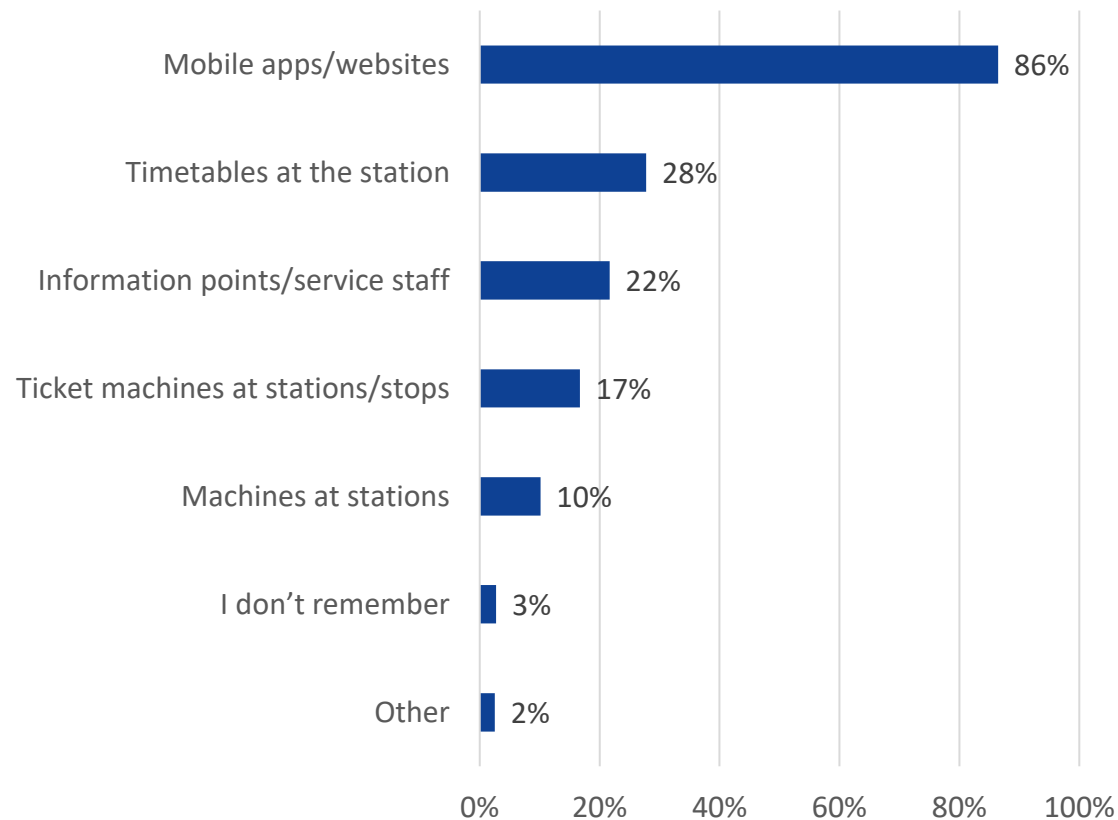
Information sources on PT for journey to/from start/end point

Information sources for PT trip to/from start/end point: age groups

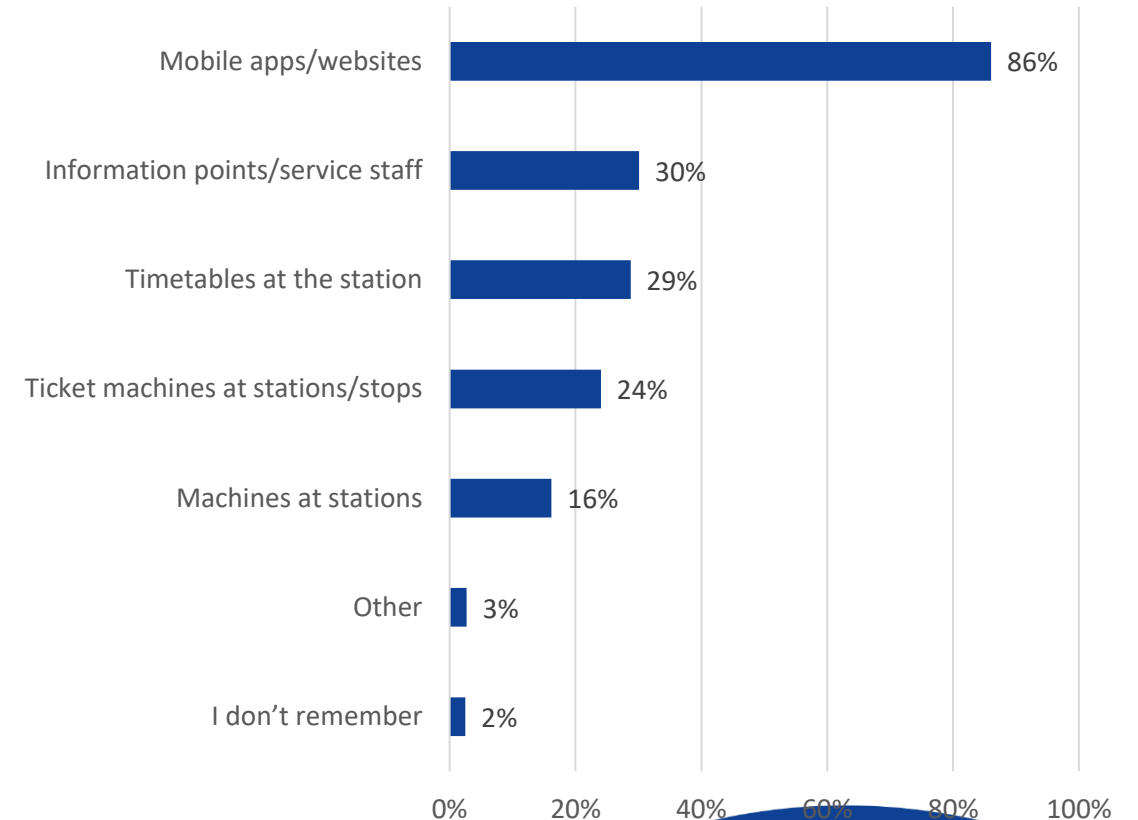


Information sources on PT during cycling holidays

Visitors of Danube region

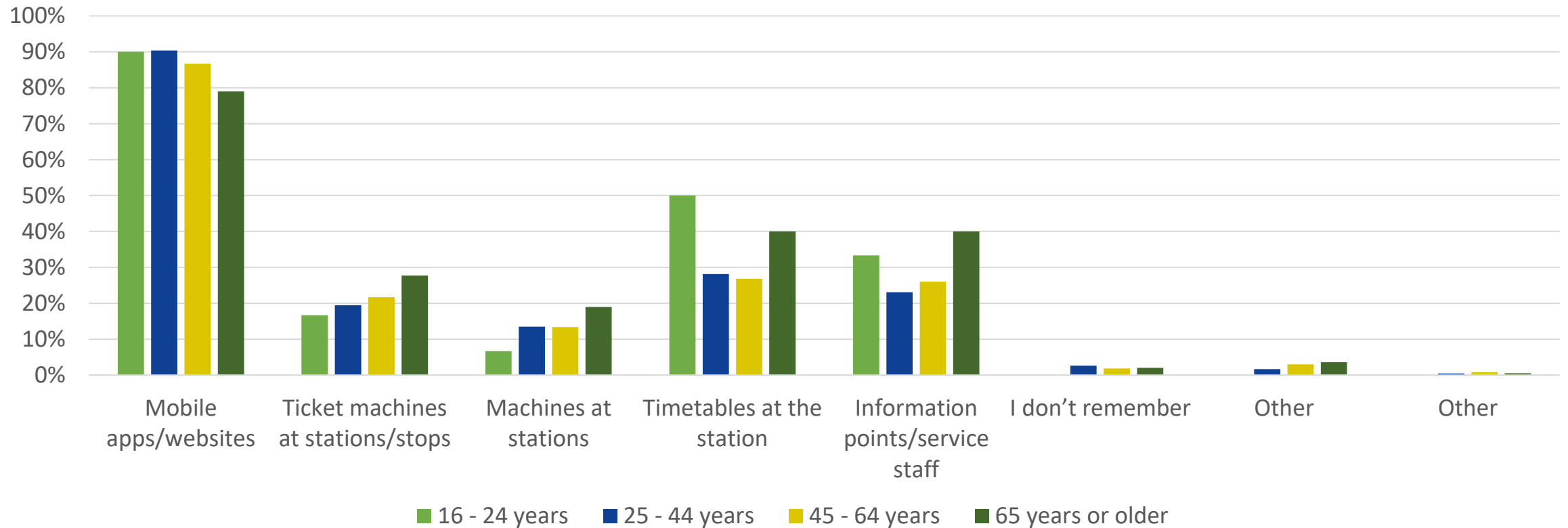


Cycling holidays outside Danube region



Information sources on PT during cycling holidays

Information sources on PT during cycling holidays: age groups



Satisfaction with Public Transport

Public transport: Satisfaction

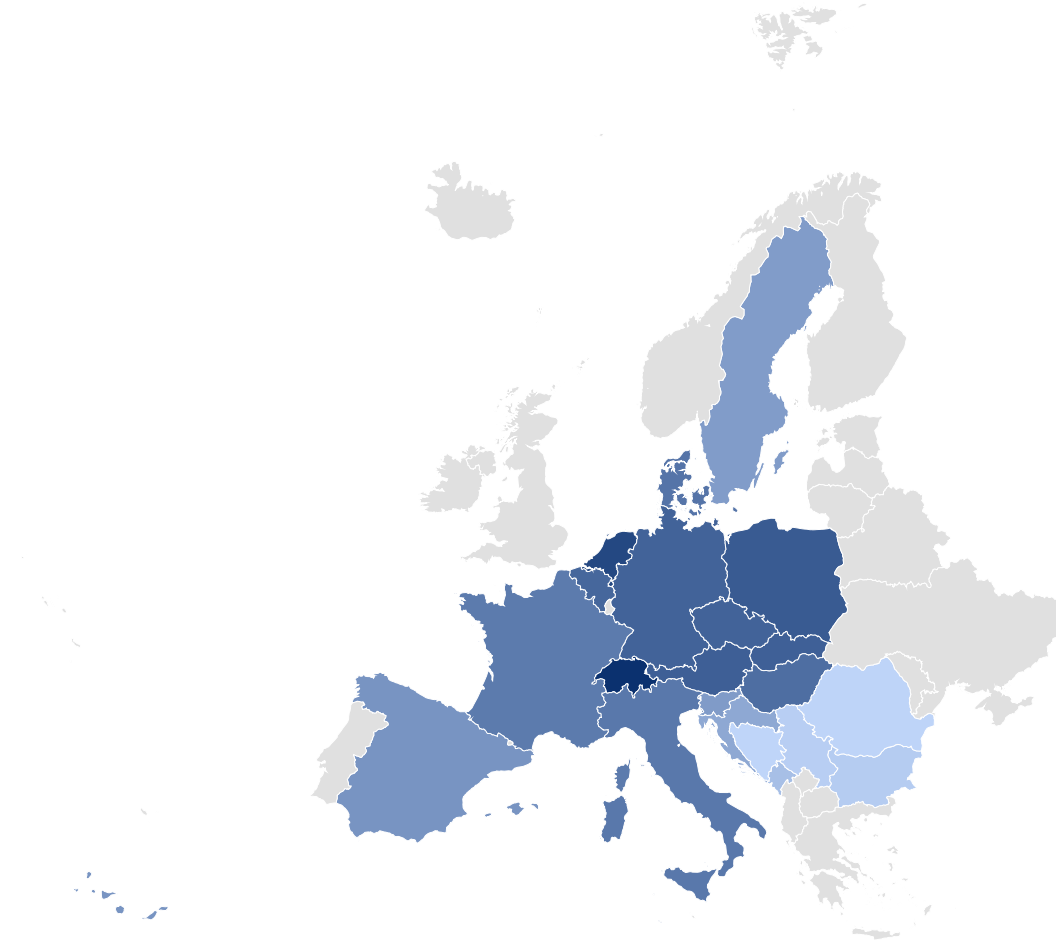
- Satisfaction with public transport-related aspects is noticeably lower than overall satisfaction with cycling holidays (4.6/5):
 - Overall experience with PT stations: 3.3/5 (both all answers + Danube region visitors),
 - Taking one's bike on PT: 3.5/5 (both all answers + Danube region visitors)
- Ranking of five most important areas needing improvement:

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

Public transport: Satisfaction



Satisfaction with availability of public transport



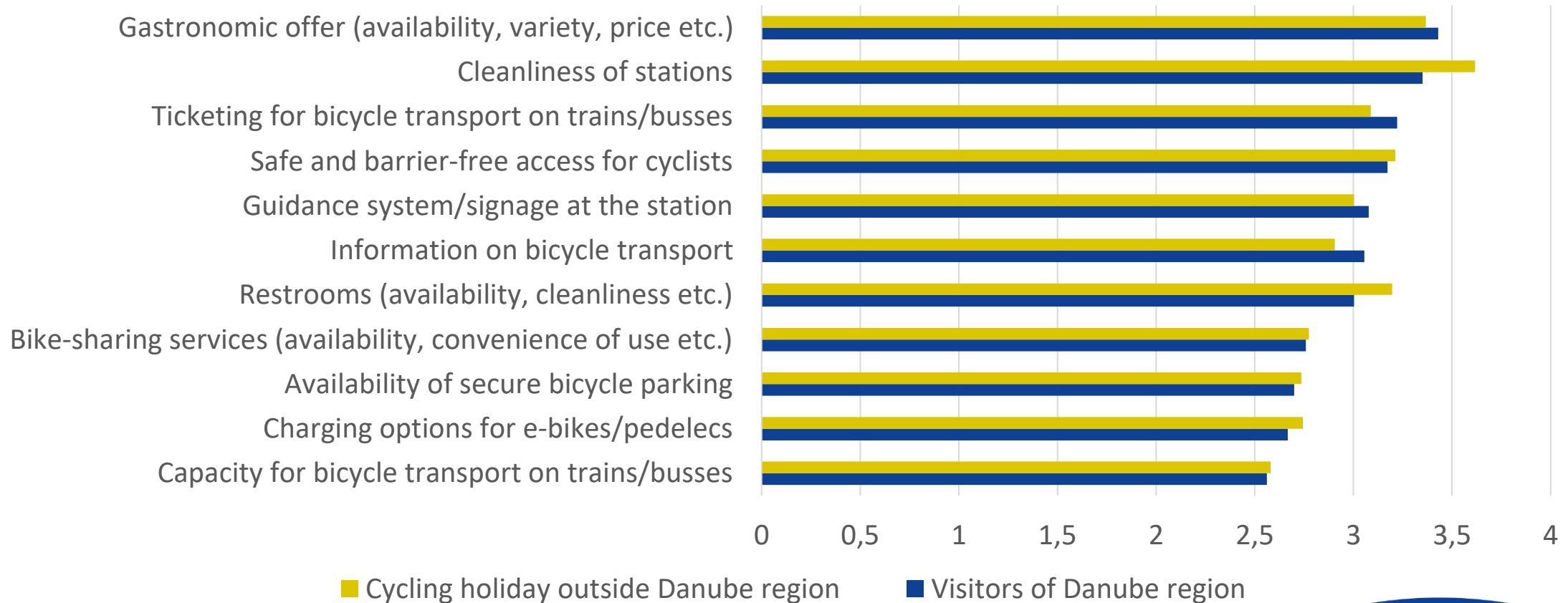
Satisfaction

3,86

3,07

Public transport: Satisfaction

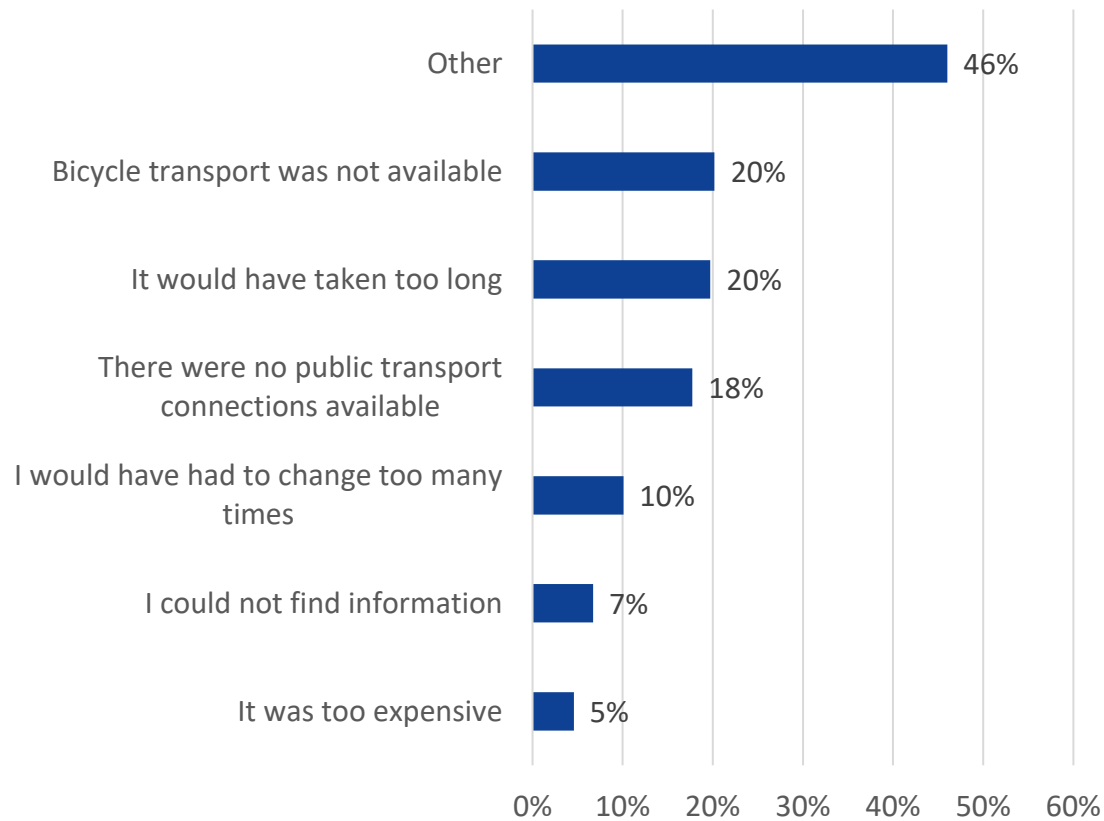
Satisfaction with specific aspects of PT stops



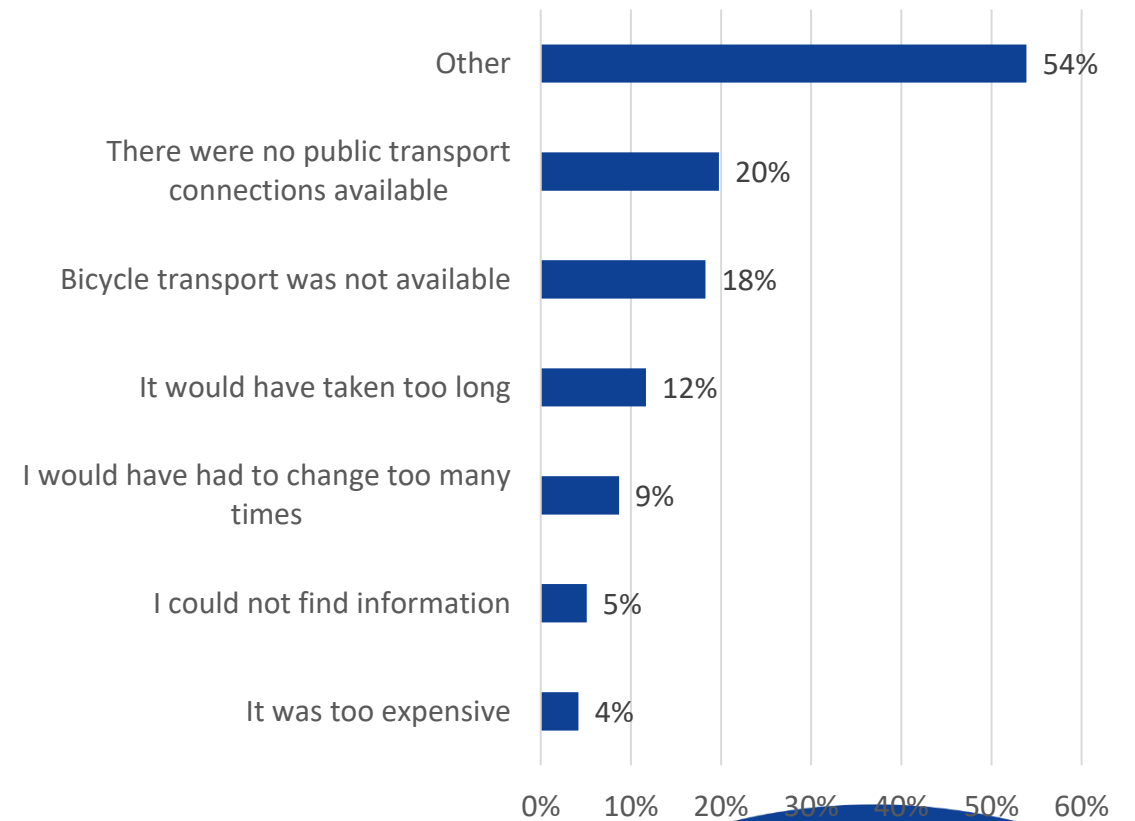
Reasons for not using PT



Visitors of Danube region

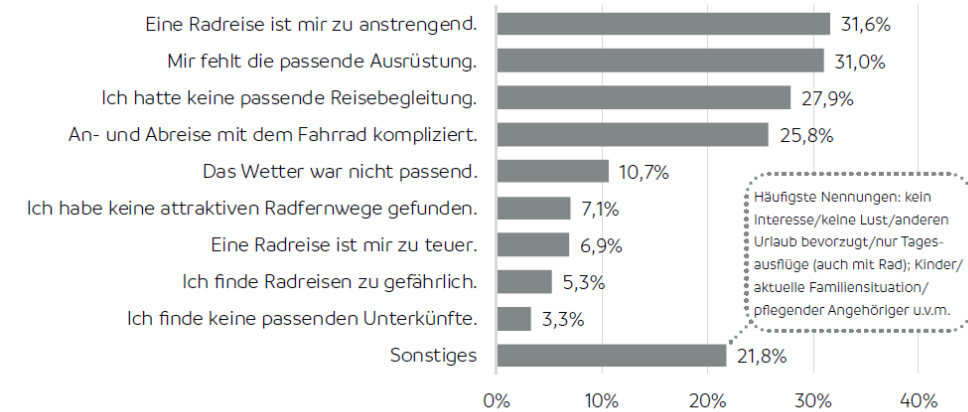
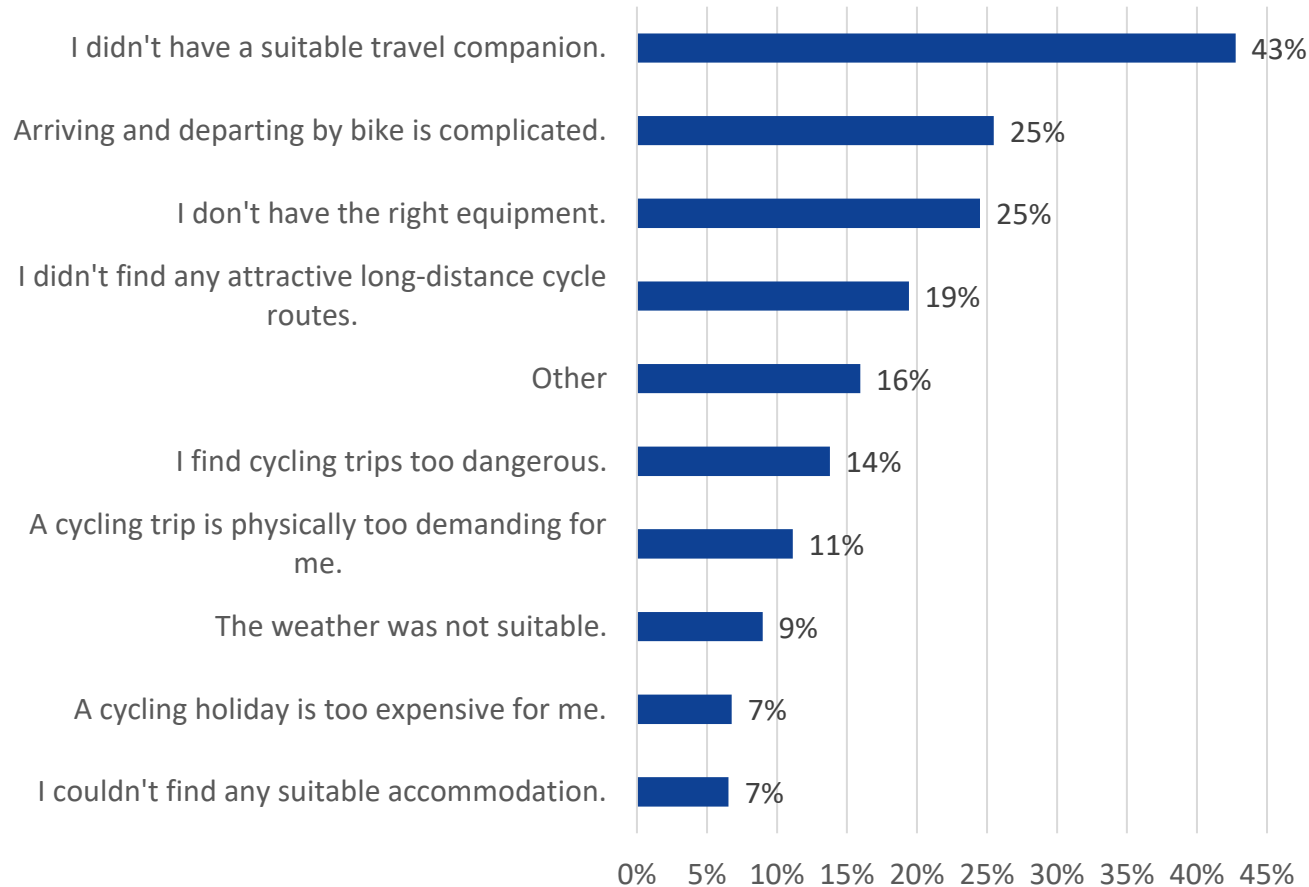


Cycling holidays outside of Danube region



People not going on cycling holidays

Reasons for not going on a cycling holiday



Bezug: Personen, die in den letzten 3 Jahren keine Radreise unternommen haben; n = 6.472 (Mehrfachnennungen)

For comparison: ADFC Bicycle Travel Analysis

Contact

Interreg
Danube Region



Co-funded by
the European Union


Active2Public Transport



Holger Haubold



EUROPEAN CYCLISTS' FEDERATION



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