

SYSTEM FOR QUANTITATIVE AND QUALITATIVE MONITORING OF TARGET GROUPS

- EuroVelo 13 - Iron Curtain Trail -

Deliverable D.3.2.4

QUANTITATIVE MONITORING SUMMARY AND QUALITATIVE MONITORING STUDY

02.2026



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1. INTRODUCTION: IMPORTANCE AND BENEFITS OF JOINT VISITOR MONITORING

The EuroVelo 13 - Iron Curtain Trail is a transnational long-distance cycling route that traces the former border dividing Eastern and Western Europe. Stretching over 10,000 kilometers and crossing 20 countries, the trail is a living monument to Europe's recent history and a dynamic corridor for sustainable tourism and regional development.

In the context of the Innovative Iron Curtain Trail project, establishing a joint and harmonized system of visitor monitoring is a strategic tool to support evidence-based decision-making across national borders. It provides tangible benefits for all stakeholders:

- **Destination Management Organizations (DMOs)** can better plan services and infrastructure based on user patterns and seasonal trends.
- **Policy makers** gain insights into the trail's socio-economic and environmental impacts, informing funding decisions and legislative support.
- **Businesses** can target investments more effectively based on user profiles and behaviors.
- **Researchers and NGOs** receive standardized data for assessing mobility, tourism, and sustainable development outcomes.

By monitoring trail use through a shared methodological framework, the project enables consistent data collection, cross-border comparability, and shared interpretation, reinforcing the EuroVelo 13 brand and fostering cooperation among regions.

2.FRAMEWORK: VISITOR MONITORING

The visitor monitoring framework combines two complementary methods:

2.1. Quantitative Monitoring

Quantitative monitoring involves the **systematic recording of cyclist movements** along the trail using automatic counting technologies. This approach yields objective, continuous, and high-resolution data on trail use intensity over time.

2.2. Qualitative Monitoring

Qualitative monitoring is conducted through **user surveys**, capturing subjective information about visitor characteristics, motivations, experiences, satisfaction levels, and expectations. This method enriches the quantitative data and supports more targeted improvements and communication strategies.

Together, these methods provide a **holistic view of visitor dynamics**, addressing both the "*how many*" and the "*who, why, and how*" dimensions of trail use.

3. QUANTITATIVE MONITORING

3.1 Data Collection Approach

Quantitative data of trail users (cyclists, pedestrians) were gathered through a network of automatic counters installed at selected points along the EuroVelo 13 cycle route. This included data from already existing counters, where the data were available and project partners got permission from data owners to use and publish the data.

In 2025 the project partner PP06 - Partnerství, o.p.s., planned to install 1 new bicycle and pedestrian counter close to the Hardegg - Čížov border crossing on the EuroVelo 13 cycle route in cooperation with the Podyjí National Park in order to improve the existing net of bike counters along EuroVelo 13 and in the National Park. But as the Podyjí National Park received funding for a major replacement of all its old counters for new ones in 2025, it has installed in cooperation with Partnerství, o.p.s. 11 new bicycle and pedestrian counters, including 1 at the the Hardegg - Čížov border crossing and 1 on Kraví hora (both localities are along EuroVelo 13). Data from both counters will be included into the web-based data application during data update in 2026.

3.2 Standardized Counter And Data Evidence

To ensure comparability across partners, permanent counter and quantitative data evidence followed a common structure:

Chart 1: Standardized counter and data evidence form

Column Name	Description	Example
Counter_ID	Unique identifier in the format EV13-COUNTRY CODE-COUNTER NUMBER	EV13-CZ-001
Location_name	Descriptive name of the counter location	Mikulov - Sedlec
GPS_lat	Latitude in WGS84	48.800123
GPS_lon	Longitude in WGS84	16.646789
Location_type	Type of counter location (urban/suburban/rural)	Suburban
Device_type	Commercial name of the device	Eco-Counter PYRO
Detection_technology	Type of detection technology used	infrared sensor
Traffic_type	Type of traffic being monitored	Cyclists
Directional_detection	Direction of movement is detected (yes/no)	Yes
Data_available_from	Date of first data	2020-01-01
Data_available_to	Date of last data	2024-12-31

Data_frequency	Frequency of data (hourly/daily/monthly)	Hourly
Data_owner	Organization responsible for managing the counter and the data owner	Partnerství, o.p.s.
Data_publicity	Approval by data owner to publish the data in online web application (yes/no)	Yes

Standardized counter and data evidence has been created (see Attachment I) and data from selected existing automatic counters for the period from 1.1.2020 (or later according to data availability) to 31.12.2024 have been gathered and sent to Partnerství, o.p.s. by partners from Poland, Slovakia and Hungary in available granularity (hourly/daily) for further processing.

Picture 1: Map of selected existing automatic counters along EuroVelo 13

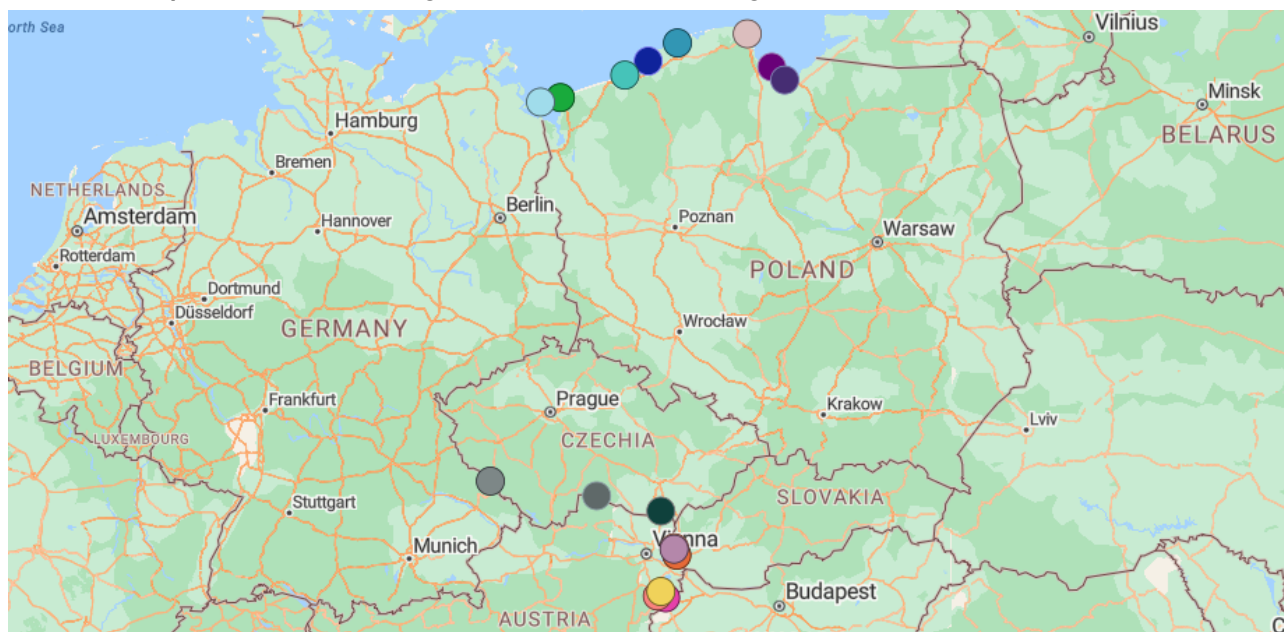


Chart 2: Chart of selected existing automatic counters along EuroVelo 13

Country	Localities	Counters
Czechia	Špičák (CZ), Slavonice (CZ), Lukov (CZ), Mikulov (CZ)	4
Hungary	Hidegség (HU), Sopron - Tomálom (HU), Sopron - Kemping (HU)	3
Poland	Darłowo (PL), Sarbinowo (PL), Darłowo (PL), Kołczewo (PL), Świnoujście (PL), Kmiecin (PL), Poddąbie (PL), Puck - Kaczy Winkiel (PL), Gdańsk Wyspa Sobieszewska (PL)	9
Slovakia	Piesočná (SK), Vysoka pri Morave (SK), Vysomarch (SK), Cyklomost Slobody (SK), Devinska Nova Ves (SK)	5
Total		21

See details in Standardized counter and data evidence in Attachment I.

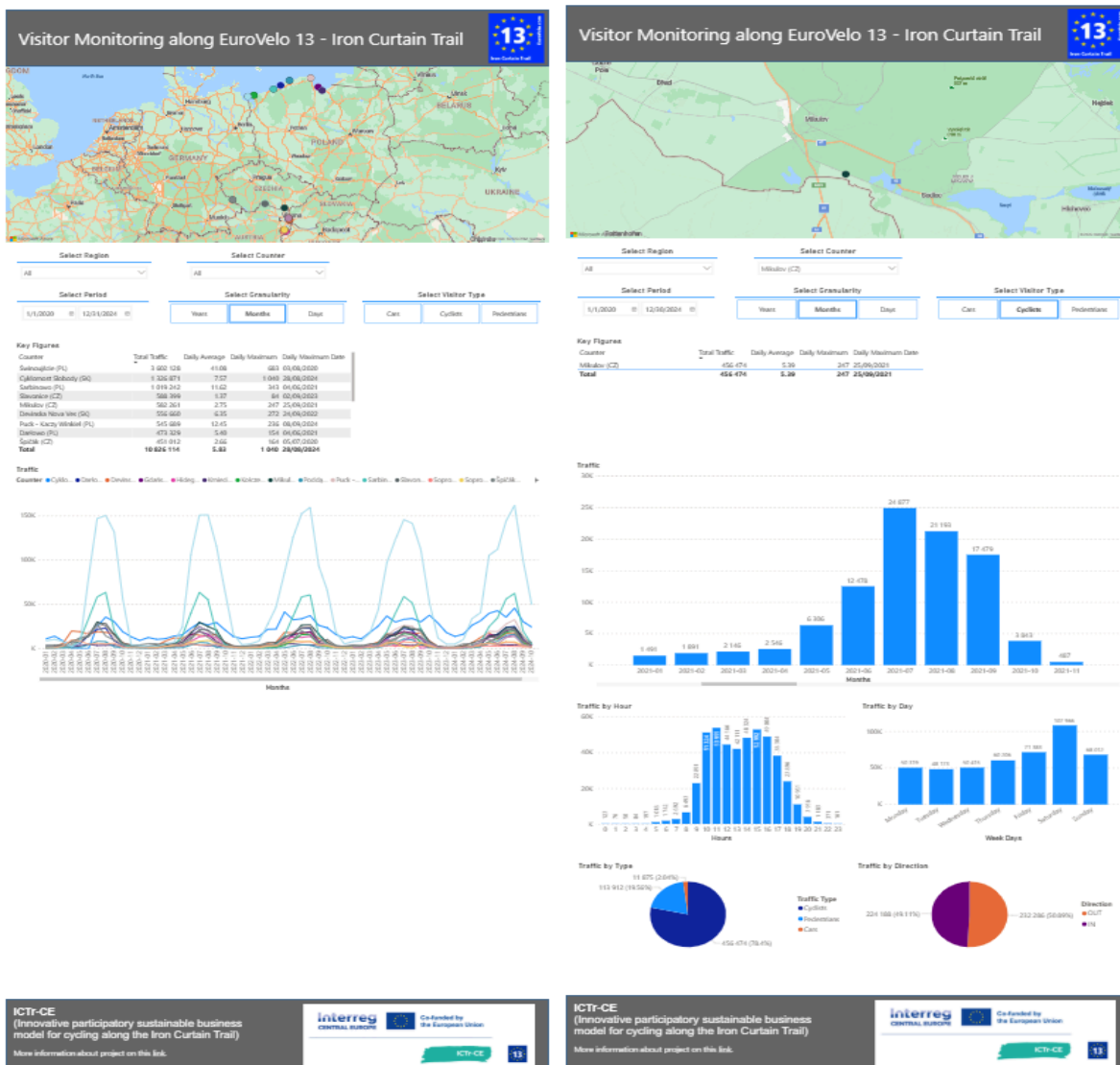
3.3 Data Management and Sharing

Quantitative Visitor Monitoring Data from selected permanent automatic counters along EuroVelo 13 for the period from 1.1.2020 (or later according to data availability) to 31.12.2024 have been be uploaded to a web-based application based on Power-BI platform, developed and designed by Partnerství, o.p.s. Anonymized, aggregated data sets are imported in the web based application via API or manually and published to support transparency, research and communication. The data are accessible to project partners as well as to the general public.

The web-based online application is accessible via link: <https://mellifluous-cat-0c7f7c.netlify.app/>

It is planned that these data will be updated at least once a year in accordance to their availability and accessibility.

Picture 2: Web-based online application sample (localities overview, locality detail)



4. QUALITATIVE MONITORING

4.1 Survey Methodology

Qualitative monitoring was carried out using a **standardized questionnaire** targeting cyclists traveling on the EuroVelo 13 - Iron Curtain Trail. The goal was to capture insights into:

- Visitor demographics and trip profiles
- Motivations for choosing the trail
- Perceptions of trail quality and services
- Behavior patterns and travel choices
- Levels of satisfaction and areas for improvement

4.2 Sampling Requirements

Each partner or more partners (if relevant) were responsible for collecting a **minimum of 30 valid responses** from target groups along EuroVelo 13 in each country. Surveys were conducted during **peak season** (July - September 2025).

Chart 3: Valid responses (completed questionnaires) in each country

Country	Partner/s	Valid responses
Austria	Trail Angels GmbH	32
Czechia	Public benefit company Partnerstvi	30
Croatia	Koprivnica Križevci County	34
Germany	Ecological Tourism in Europe Association	30
Hungary	Westpannon, CROST	53
Poland	Westpomeranian Region, City of Gdansk	33
Slovakia	Ekopolis Foundation	33
Slovenia	Iskriva, University of Primorska	30
Total		275

4.3 Target Groups

The respondents were picked up from the following main **target groups of cyclists**:

- Multi-day trips:
 - Long-distance cycle tourists (multi-day riders across regions or countries)
 - Holiday cyclists on cycling-focused vacations (stationary base with daily rides)
 - Guided tour participants on organized cycling trips
 - Bikepacking adventurers traveling independently with minimal support
- One-day trips or half-day trips:
 - Day-trip leisure cyclists from outside the local area (regional or national visitors)
 - Tourists integrating cycling into a broader travel itinerary

All the partners tried to exclude **commuters and local cyclists**.

4.4 Data Collection Methods

Two complementary methods were used:

1. Direct interviews

Conducted in person by trained staff or volunteers along the trail (e.g. at rest areas, border points, viewpoints).

2. Indirect distribution

Paper or digital versions of the questionnaire made available at:

- Tourist information centres
- Hotels, guesthouses, and campsites
- Bike shops and service providers
- Cultural or natural attractions near the trail

Respondents were encouraged to complete the survey via on-site forms or QR codes linking to an online version.

4.5 Survey Content

Core topics that were included in the questionnaire:

- Country of residence and travel group composition
- Travel mode and stage of the journey
- Duration of trip and distance traveled
- Main motivations for the trip (e.g. nature, history, sport)
- Daily spending estimates and accommodation preferences
- Use of services and infrastructure along the route
- Level of satisfaction with signage, surface, safety and amenities
- Awareness of the EuroVelo 13 trail and associated branding
- Suggestions for future improvements

4.6 Data Analysis and Presentation

Survey responses were compiled and cleaned by each partner. A centralized coordinator has conducted cross-regional analysis to identify:

- User profiles and key segments
- Common motivations and satisfaction drivers
- Areas with high/low service performance
- Recommendations for service development and marketing

Results have been summarized in a **comprehensive project study**, which:

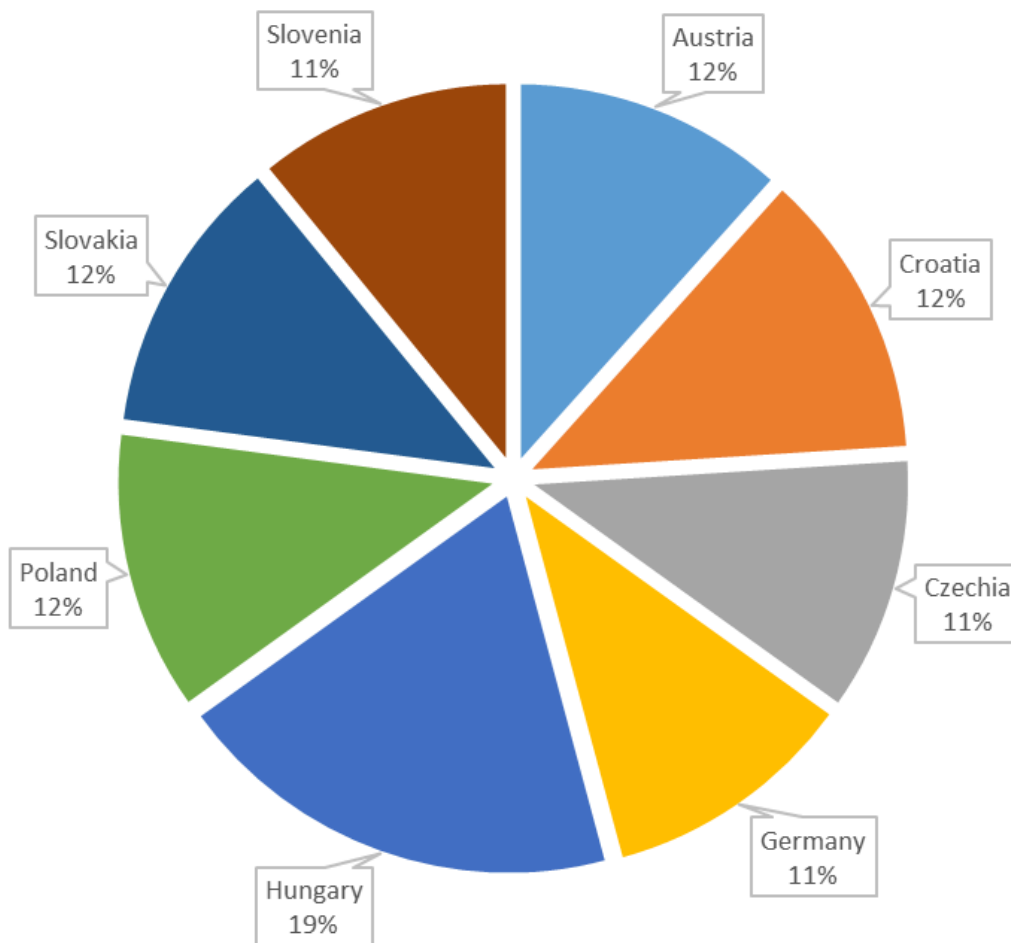
- Includes statistical summaries and selected qualitative quotes
- Identifies common trends and regional specificities
- Provides practical recommendations
- Serves as a baseline for future monitoring cycles

The final study has been published in digital format and shared with project partners and made available to policy makers and tourism stakeholders, interested public and media etc.

5. QUALITATIVE DATA ANALYSIS AND RESULTS

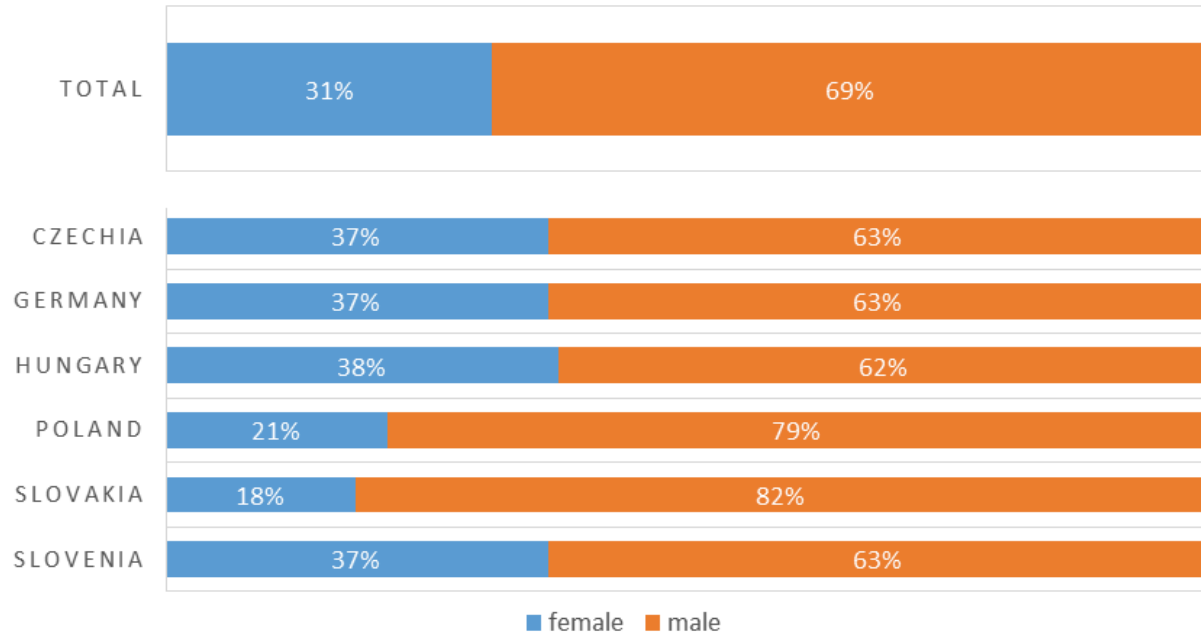
Based on survey responses a complete data analysis has been conducted. The results of the survey are evaluated below within the framework of individual questions.

Graph 1: Your place of residence (country) (N=275)



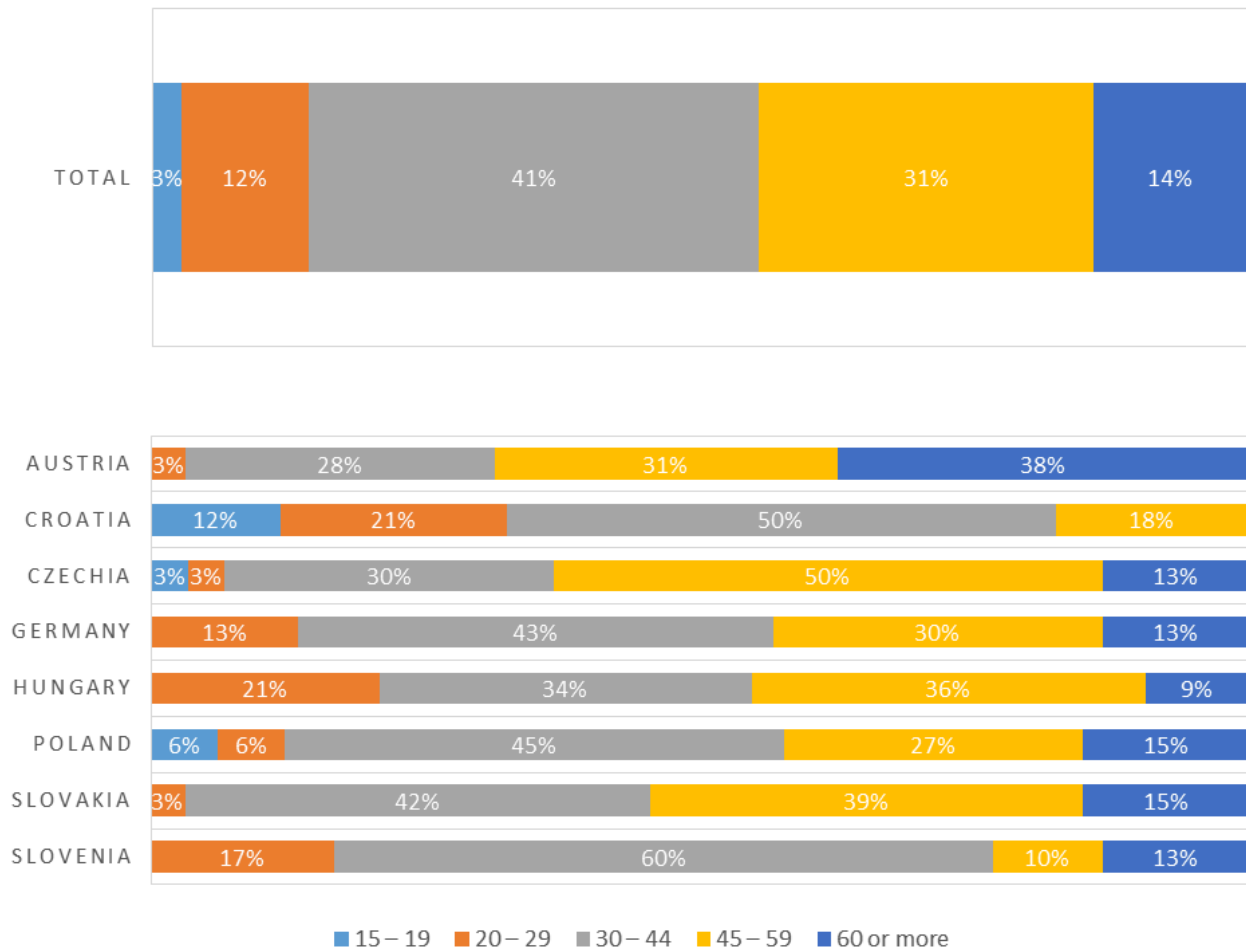
Graph 1 shows the country distribution of respondents, with Hungary representing the largest share (19%). Other countries contribute fairly evenly, each around 11-12%, indicating a balanced multinational sample. This suggests the survey captures perspectives from across the EuroVelo 13 corridor rather than being dominated by a single region. Such even representation improves the comparability of findings between participating countries.

Graph 2: You're (N = 275)



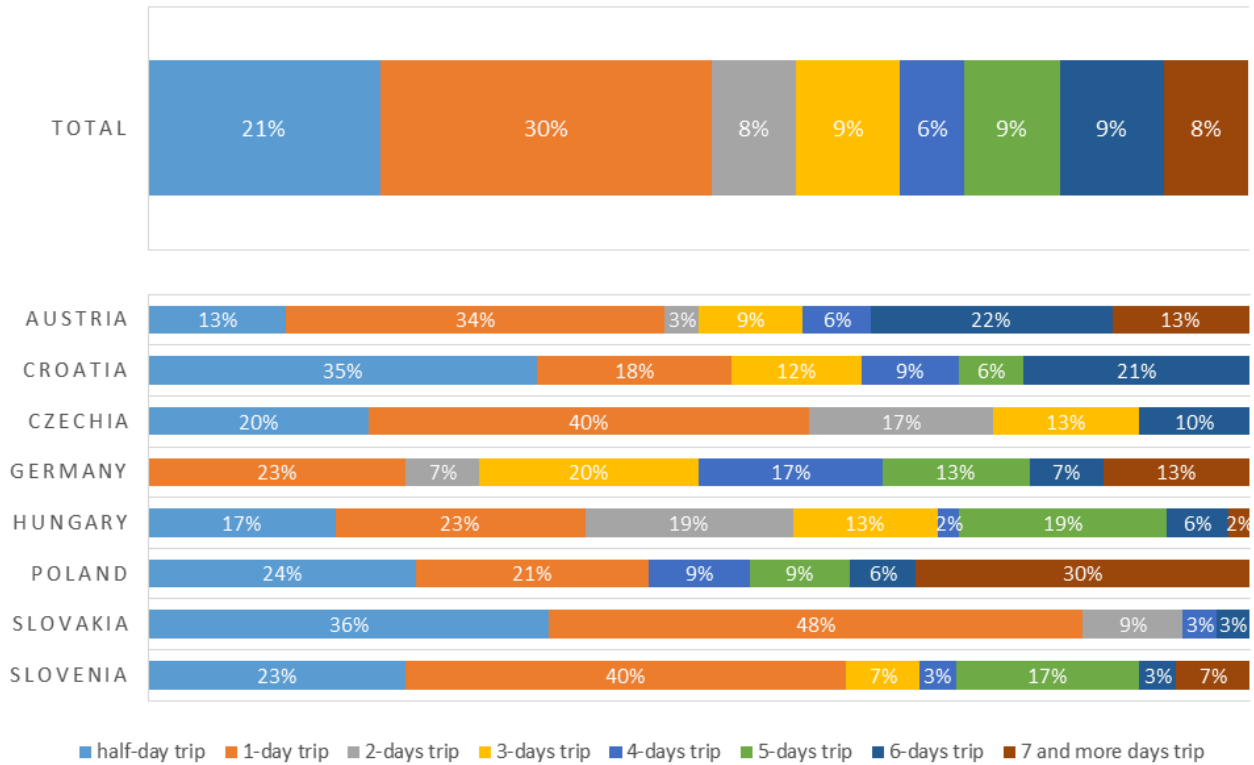
Graph 2 highlights the gender structure of the sample, with males accounting for 69% and females for 31%. This indicates a clear male predominance among surveyed cyclists. Country-level differences remain relatively small, meaning the pattern is consistent across regions. The data suggests cycling tourism along EuroVelo13 currently attracts more male participants.

Graph 3: How old are you (years)? (N = 275)



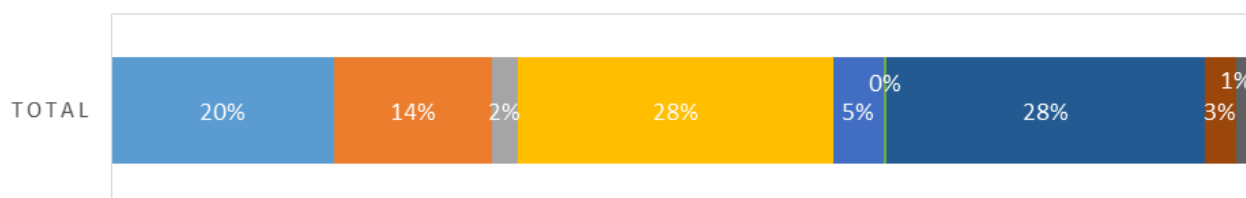
Graph 3 indicates that the dominant age group of respondents is 30-44 years (41%), followed by 45-59 years (31%). Younger cyclists under 30 represent only a minor share, while seniors aged 60+ account for 14%. This suggests that EuroVelo 13 primarily attracts middle-aged cyclists. The age structure is relatively consistent across countries, indicating similar demand characteristics along the route. Some differences can be seen in Austria (38% of 60 or more years respondents) and Croatia (0% of 60 or more years respondents).

Graph 4: How long is your cycling trip along the EuroVelo 13 - Iron Curtain Trail? (N = 275)

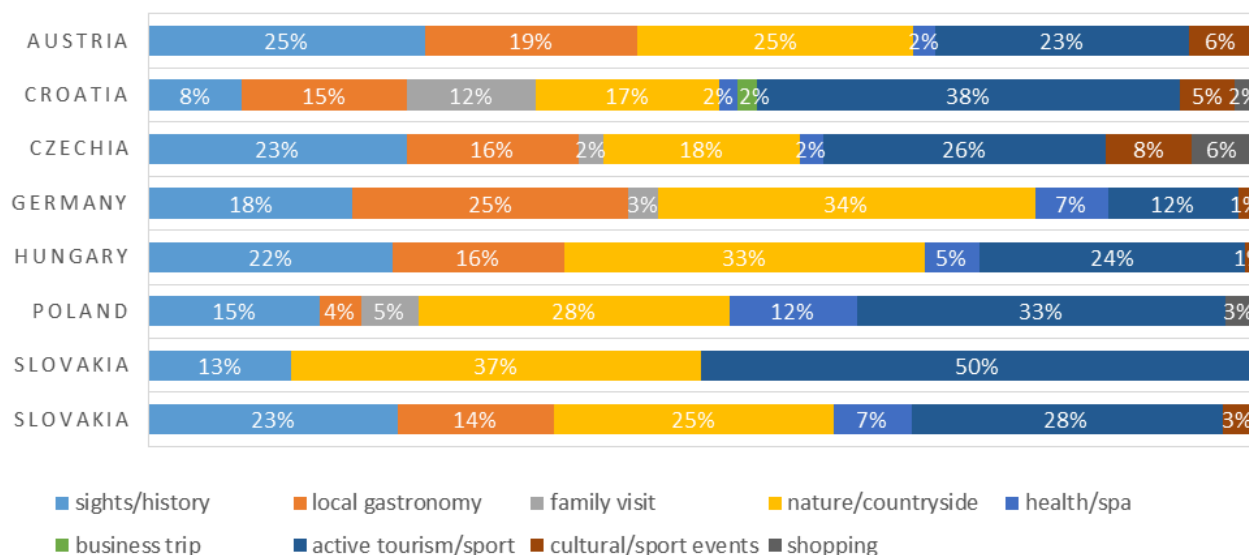


Graph 4 shows that short trips dominate along EuroVelo 13. One-day trips are the most common (30%), followed by half-day trips (21%). Multi-day trips longer than four days represent a smaller but still relevant segment. Overall, the data suggests EuroVelo 13 is frequently used for short recreational cycling rather than long-distance touring. Most long-distance tours were recorded in Poland, Austria, Germany and Croatia.

Graph 5: What is the main interest of your trip along the EV 13 - Iron Curtain Trail? (N = 275; multiple answers possible)

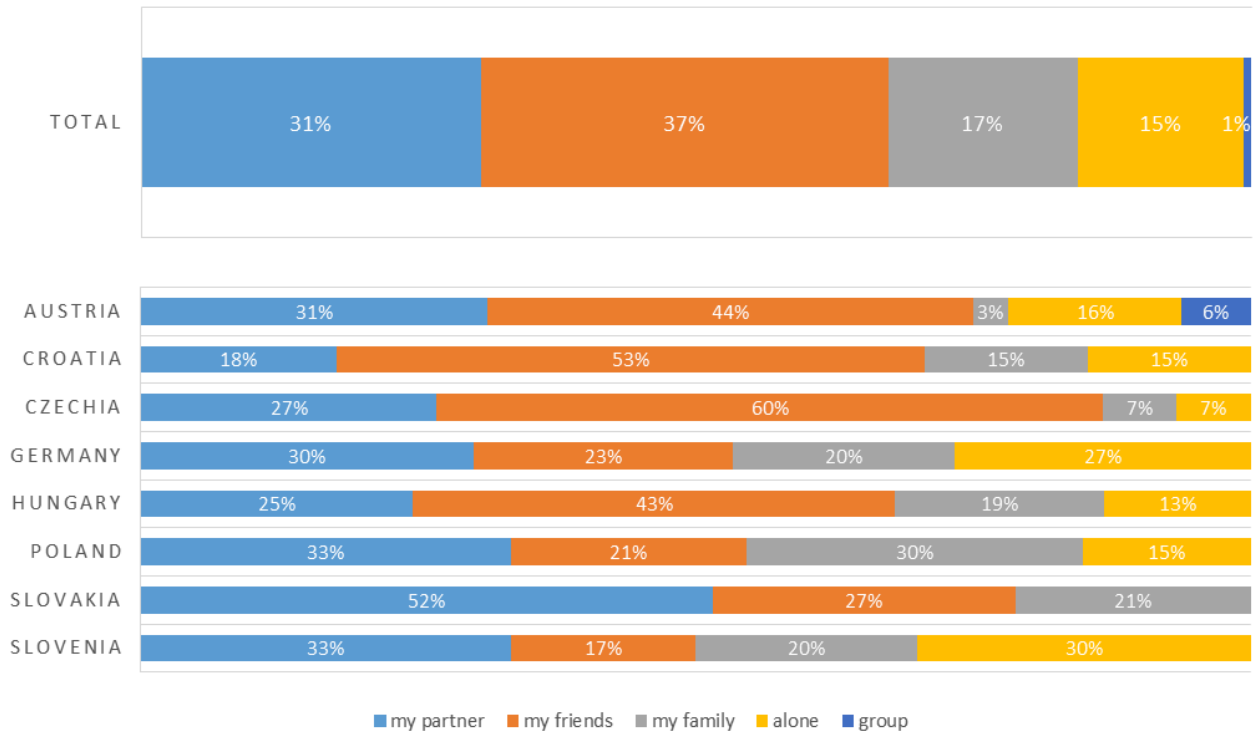


	Total
sights/history	20%
local gastronomy	14%
family visit	2%
nature/countryside	28%
health/spa	5%
business trip	0%
active tourism/sport	28%
cultural/sport events	3%
shopping	1%



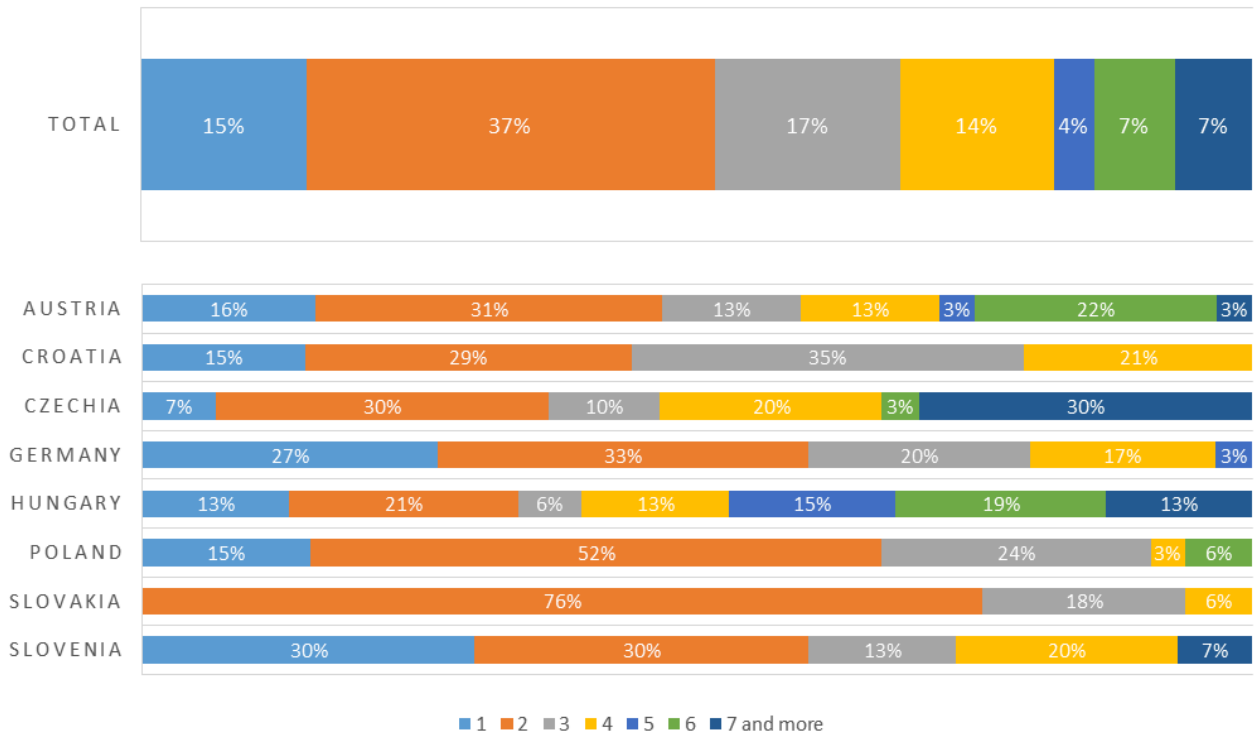
Graph 5 highlights nature and countryside (28%) and active tourism/sport (28%) as the main motivations for cycling along EuroVelo 13. Sightseeing and history also play an important role (20%). Gastronomy and family visits are secondary motivations, while business trips are negligible. This confirms the recreational and leisure-oriented character of the route.

Graph 6: Now you are riding with (N = 275):



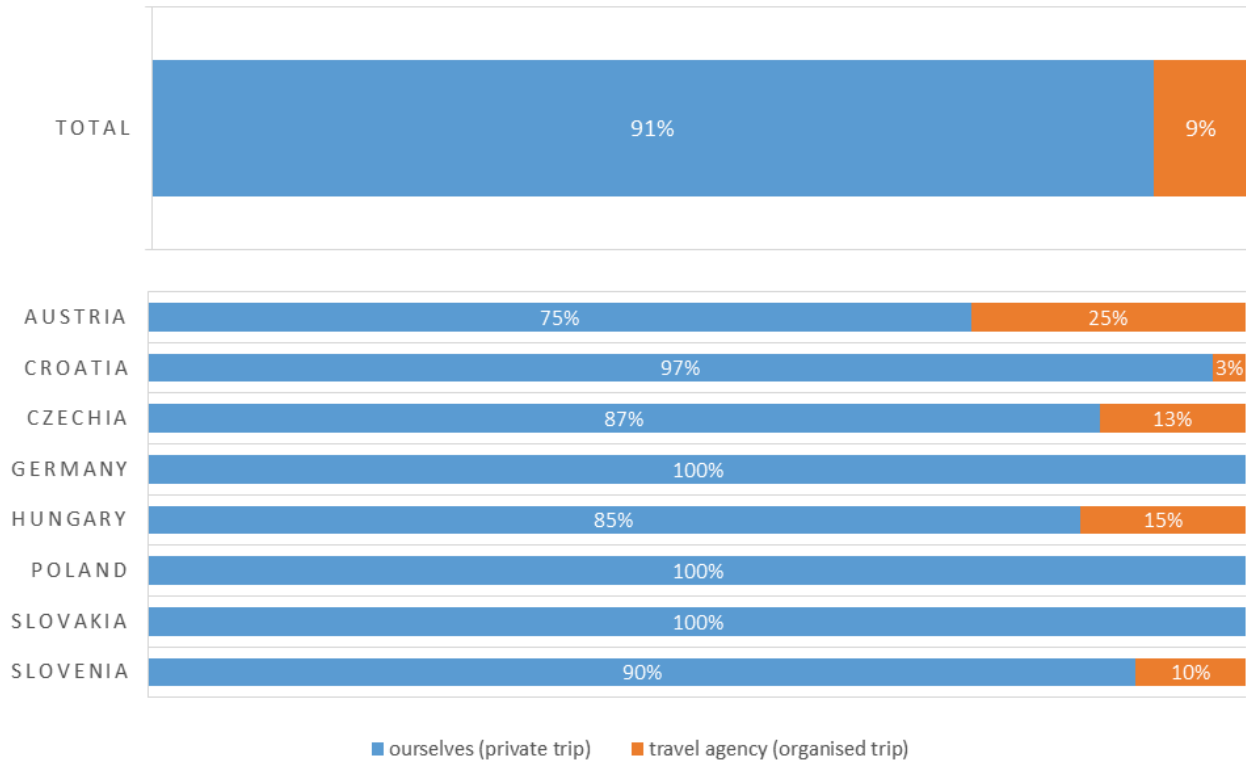
Graph 6 shows that most cyclists travel with a partner (37%) or friends (31%). Solo cyclists represent 15%, while family trips account for 17%. Organised group travel is almost negligible (1%). This indicates that EuroVelo 13 is mainly used for small, informal travel parties rather than large tour groups. The results underline the individual and recreational character of cycling tourism along the route.

Graph 7: Number of people in your group (including yourself) (N = 275):



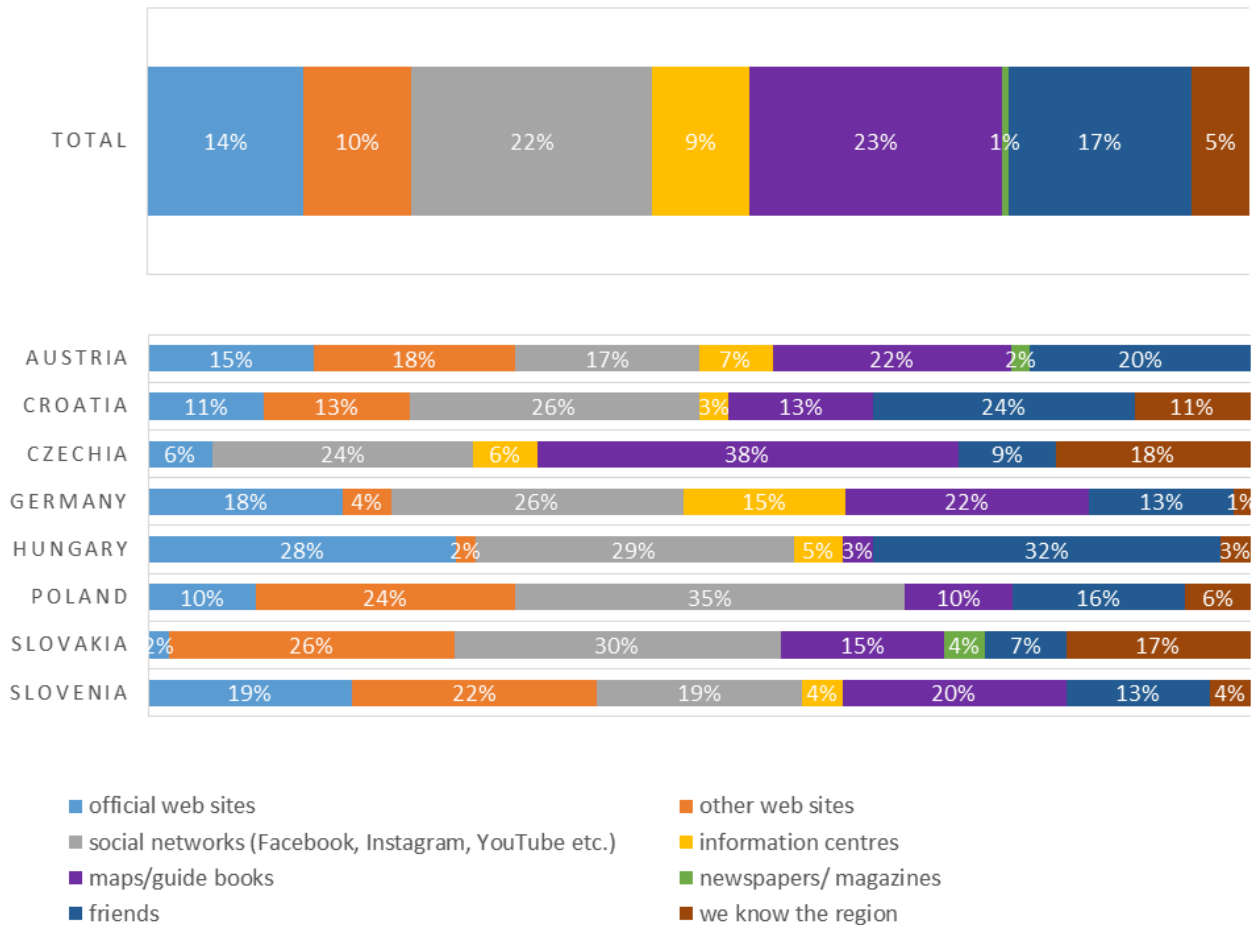
Graph 7 confirms that cycling trips along EuroVelo 13 are typically undertaken in very small groups. The most frequent group size is two people, followed by solo travellers. Groups of four or more participants are relatively rare. This distribution suggests that infrastructure and services should primarily target individuals and couples rather than large organised groups. Overall, the data reflects a highly independent travel style.

Graph 8: Did you organise the trip yourselves or did you use a travel agency? (N = 275)



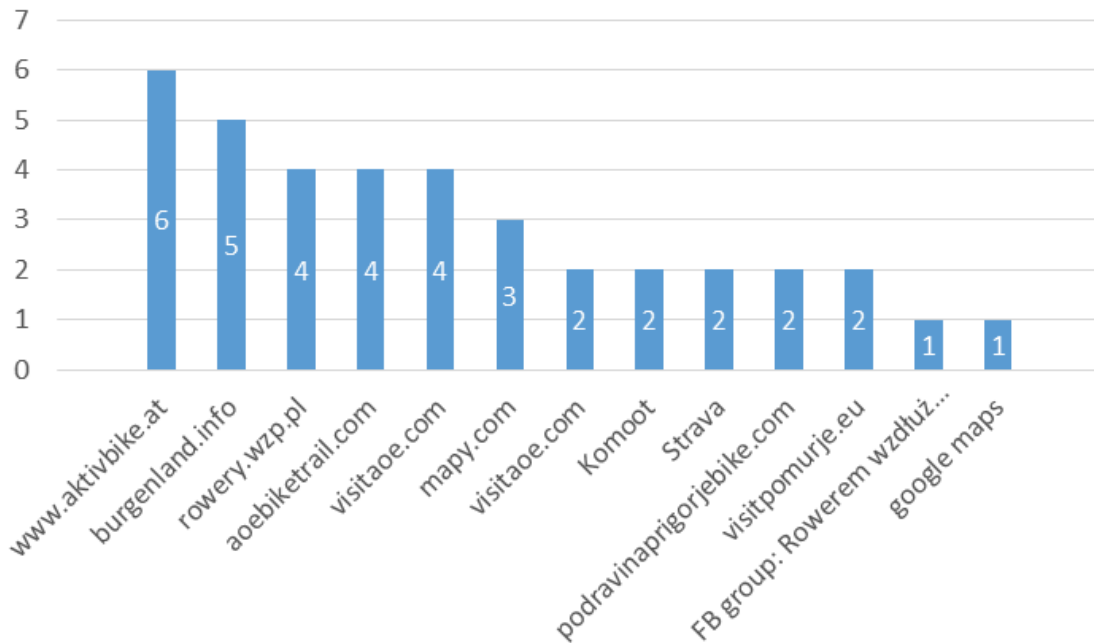
Graph 8 clearly demonstrates that cycling tourism along EuroVelo 13 is overwhelmingly self-organised. In total, 91% of respondents planned the trip privately, while only 9% used a travel agency. This highlights the importance of freely available information, online planning tools, and flexible infrastructure. The low share of organised tourism indicates limited reliance on commercial tour operators. EuroVelo 13 therefore functions mainly as an independent tourism product.

Graph 9: Where did you get the information for planning your trip/vacation? (N = 275 multiple answers possible)



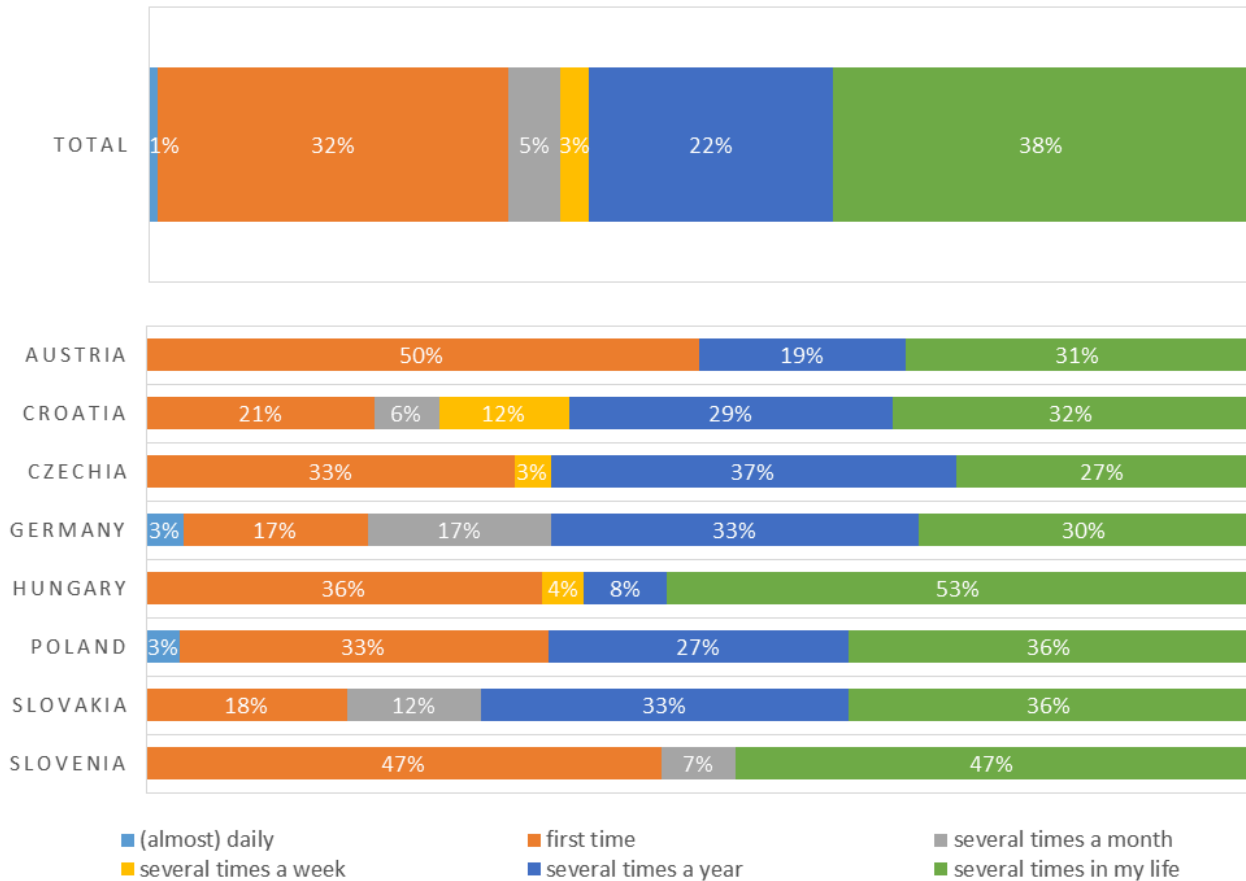
Graph 9 shows that digital information sources dominate trip preparation. Official websites and other online platforms represent the most important planning channels. Friends and previous knowledge of the region also play a significant role. Social networks contribute moderately, while newspapers and magazines remain marginal. The results confirm that EuroVelo 13 cyclists rely primarily on online resources when organising their trips.

Graph 10: Web site/application for planning your trip/vacation (N = 36):



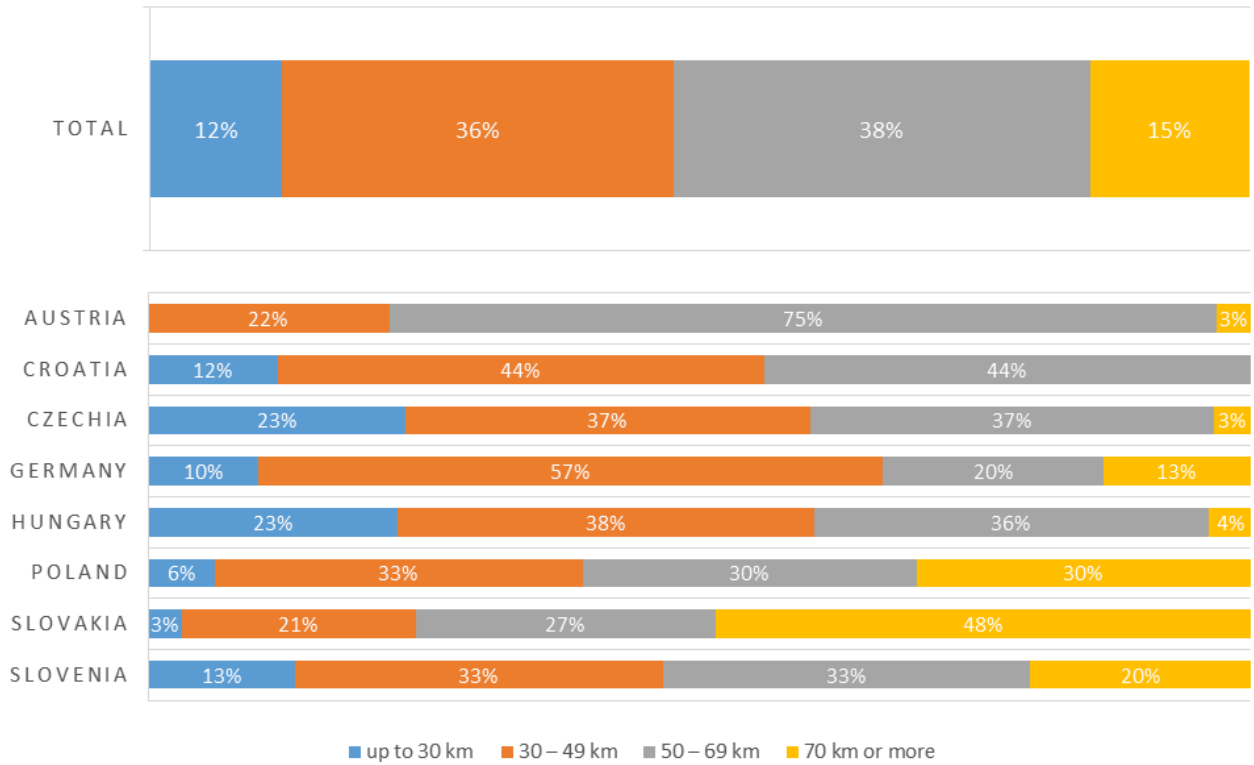
Graph 10 indicates that cyclists are using different regional websites, but also international applications like mapy.com, Komoot or Strava as a planning tool. Route managers should ensure accurate data availability on these services. Overall, digital navigation apps are important for cycling tourism planning. This reflects broader trends in modern travel behaviour.

Graph 11: How often do you ride a bike along the EuroVelo 13 - Iron Curtain Trail? (N = 275)



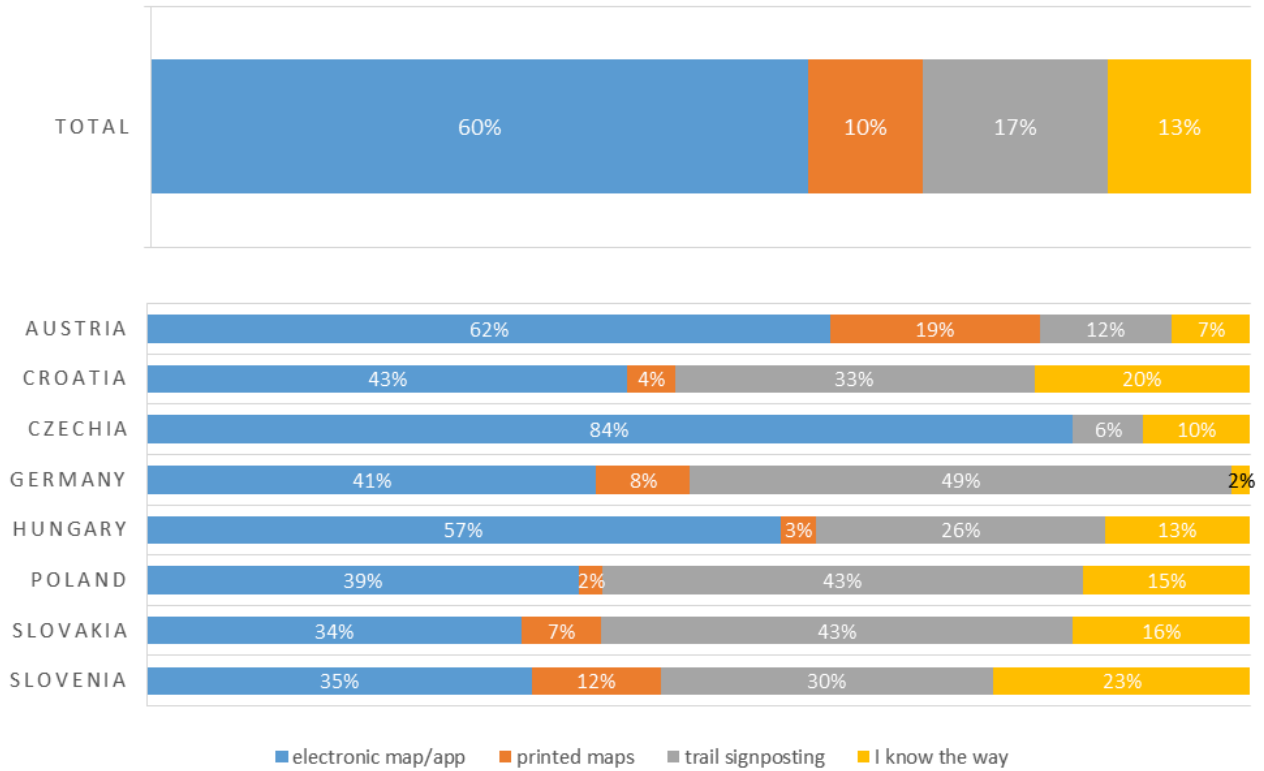
Graph 11 reveals that most respondents are not regular EuroVelo 13 users. The largest share consists of cyclists riding the trail several times in their life (38%) or for the first time (32%). Only a small proportion uses the route daily or weekly. This indicates that EuroVelo 13 functions mainly as a tourism destination rather than a commuter or everyday cycling corridor. Repeat visitation exists but is still mostly occasional.

Graph 12: What's the average daily distance of your cycling trip? (N = 275)



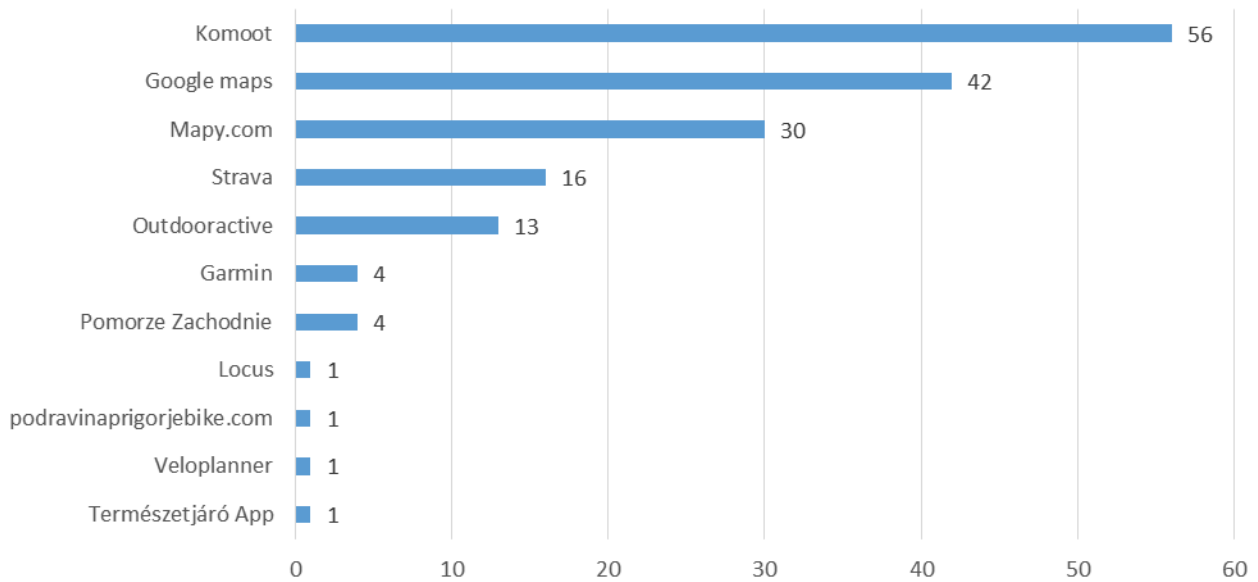
Graph 12 shows that the most common daily cycling distance is between 30-49 km. Distances of 50-69 km are also frequent, while very short rides under 30 km and long rides over 70 km occur less often. This suggests a moderate physical intensity typical for leisure cycling tourism. The findings indicate that EuroVelo 13 attracts cyclists aiming for manageable daily stages. Service planning should therefore consider stopovers within these distance intervals.

Graph 13: What type of navigation do you use along the EuroVelo 13 - Iron Curtain Trail? (N = 275)



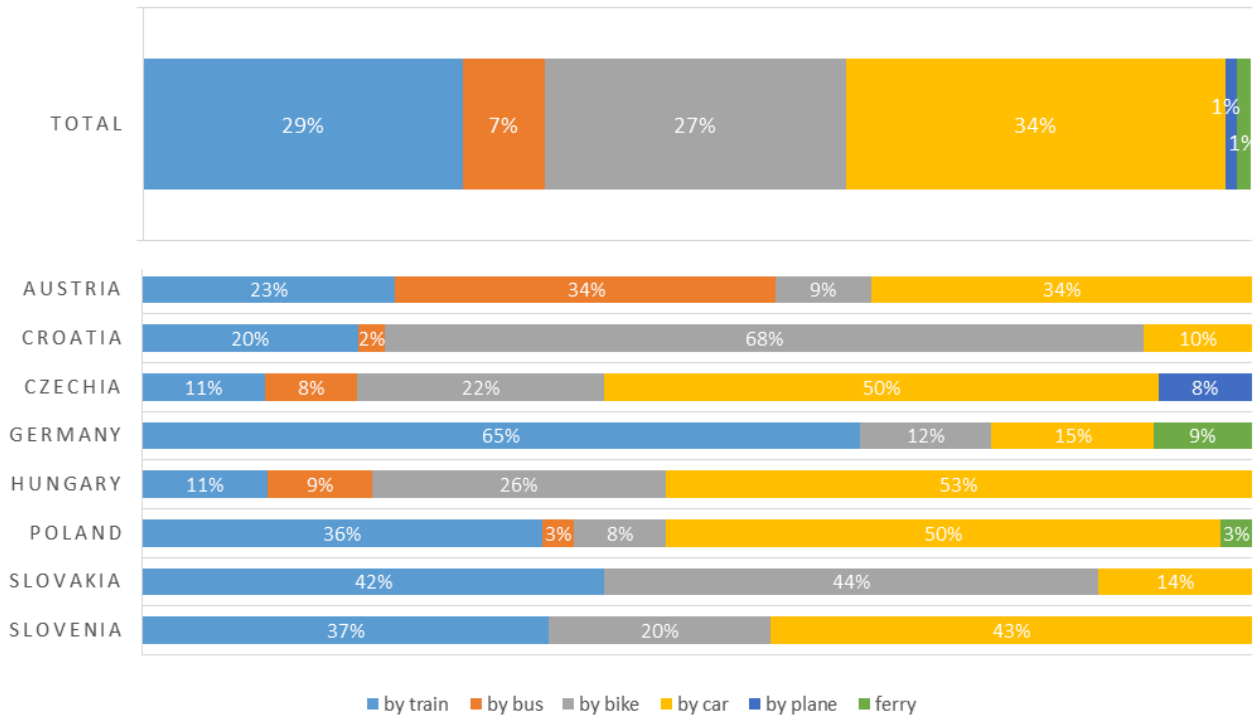
Graph 13 highlights that electronic maps and mobile applications are the most common navigation method (60%). Trail signposting is also highly relevant, while printed maps remain in use by a smaller share. Only a minority of cyclists rely purely on personal familiarity with the route. This demonstrates the importance of both digital and physical navigation infrastructure. Consistent signposting remains essential despite increasing app usage.

Graph 14: Specified electronic map/app (Total data N = 155)



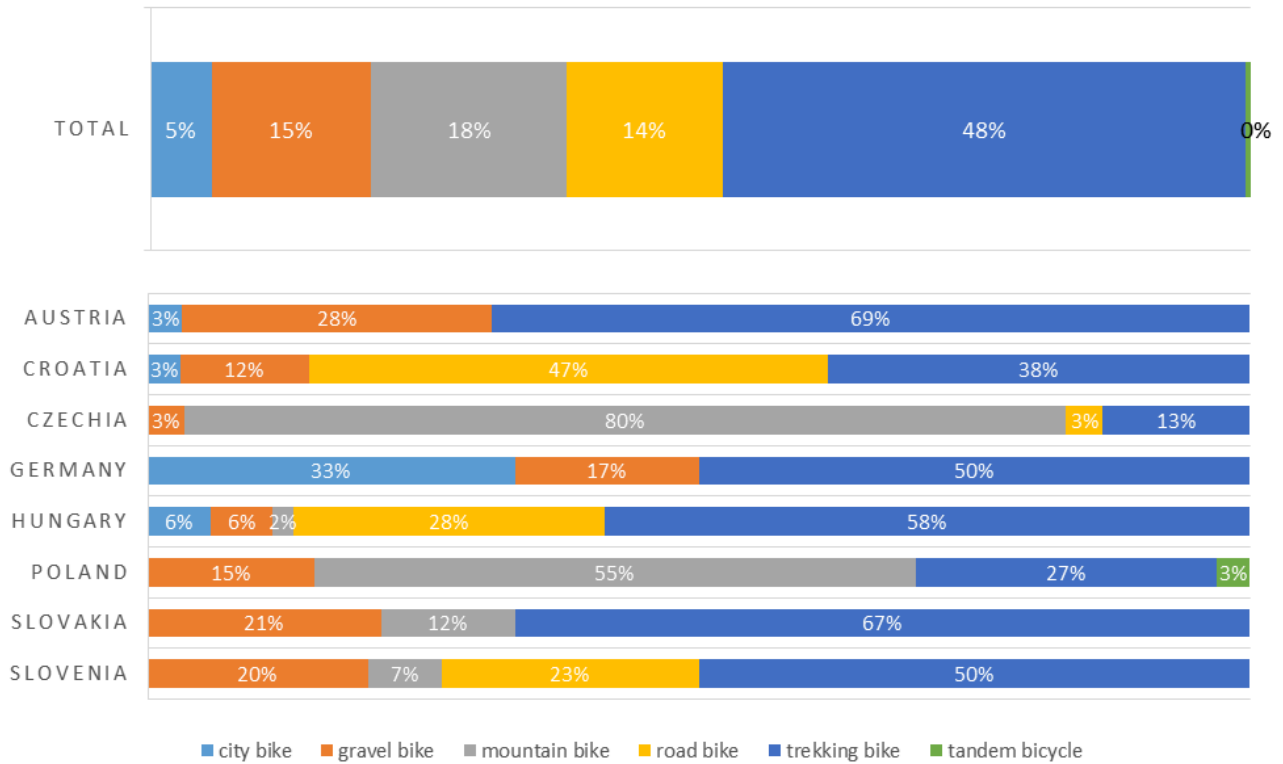
Graph 14 confirms Komoot as the most frequently used navigation application, far ahead of competitors. Google Maps and Mapy.com follow as secondary tools. Other apps such as Strava or Outdooractive are mentioned only occasionally. The concentration on a small number of platforms suggests that accurate route integration into these services is critical. Digital visibility strongly shapes the cycling experience along EuroVelo 13.

Graph 15: How did you mostly get to the EuroVelo 13 - Iron Curtain Trail (N = 275):



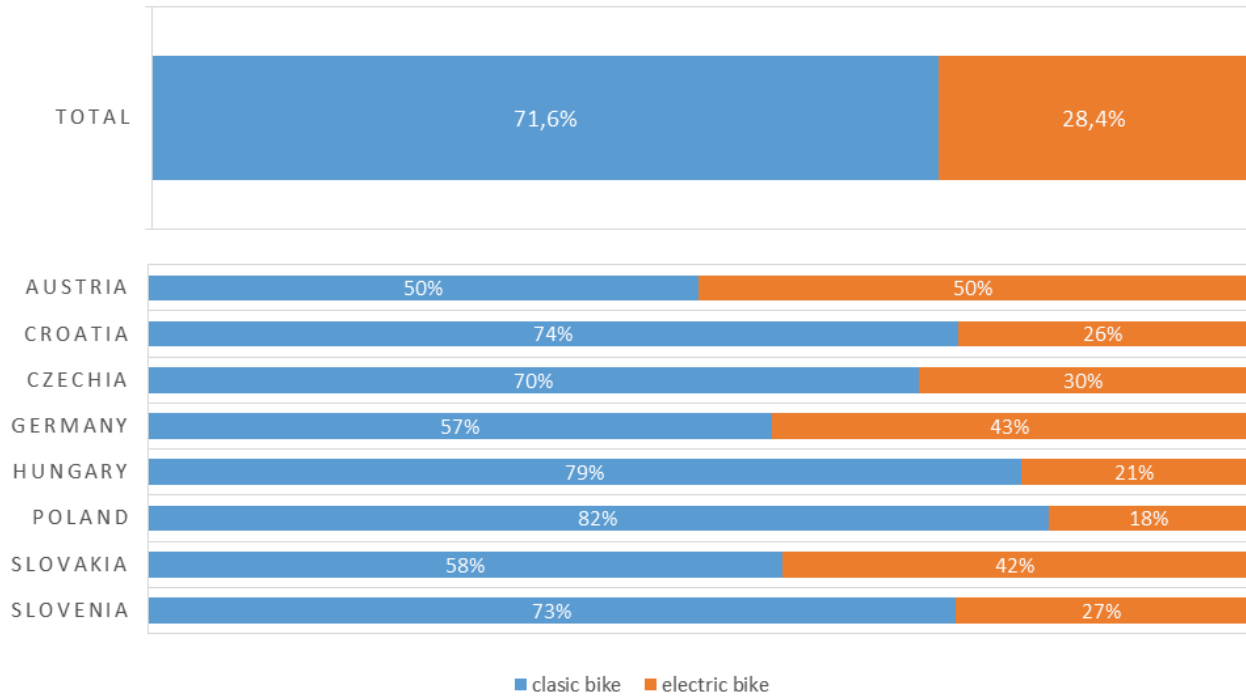
Graph 15 shows that cars (34%) and trains (29%) are the main access modes to the trail. Cycling directly to EuroVelo 13 is also significant (27%). Buses, planes and ferries play only a minor role. This indicates that EuroVelo 13 tourism depends strongly on private and rail transport connections. Improving intermodality, especially bike-train integration, could further strengthen accessibility.

Graph 16: What type of bike do you ride (N = 275)?



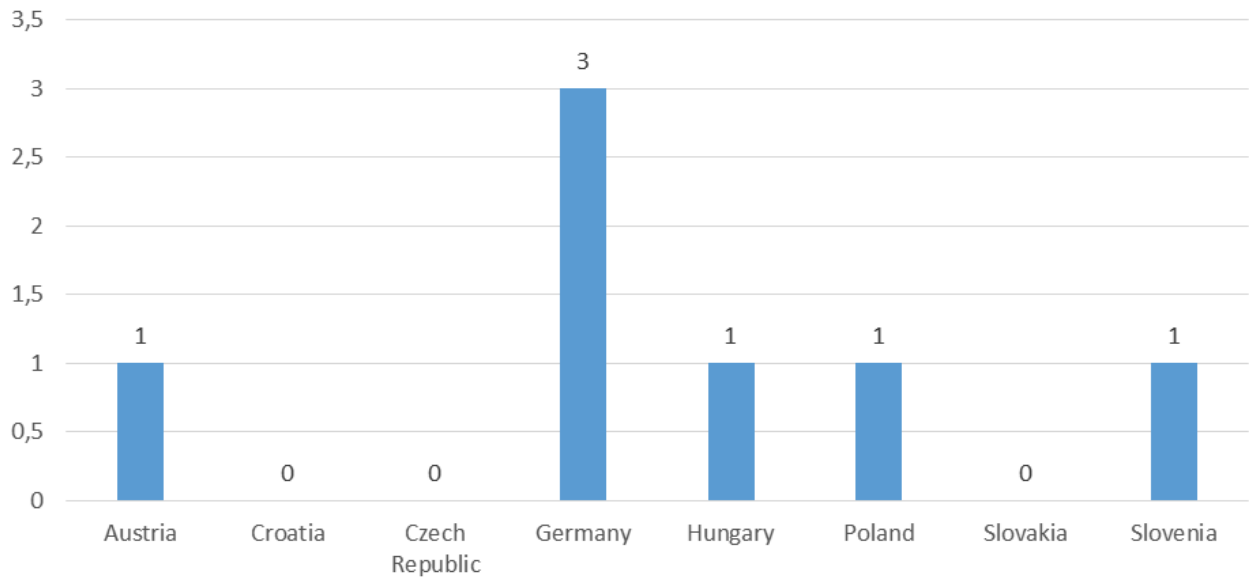
Graph 16 indicates that trekking and gravel bikes are the most commonly used bicycle types. Mountain bikes also represent an important segment, while road bikes and city bikes are less frequent. This reflects the touring and mixed-terrain nature of EuroVelo 13. The results suggest that route surface conditions require versatile bicycle equipment. Infrastructure improvements should therefore support comfortable long-distance touring bikes.

Graph 17: Electric bike? (N = 275)



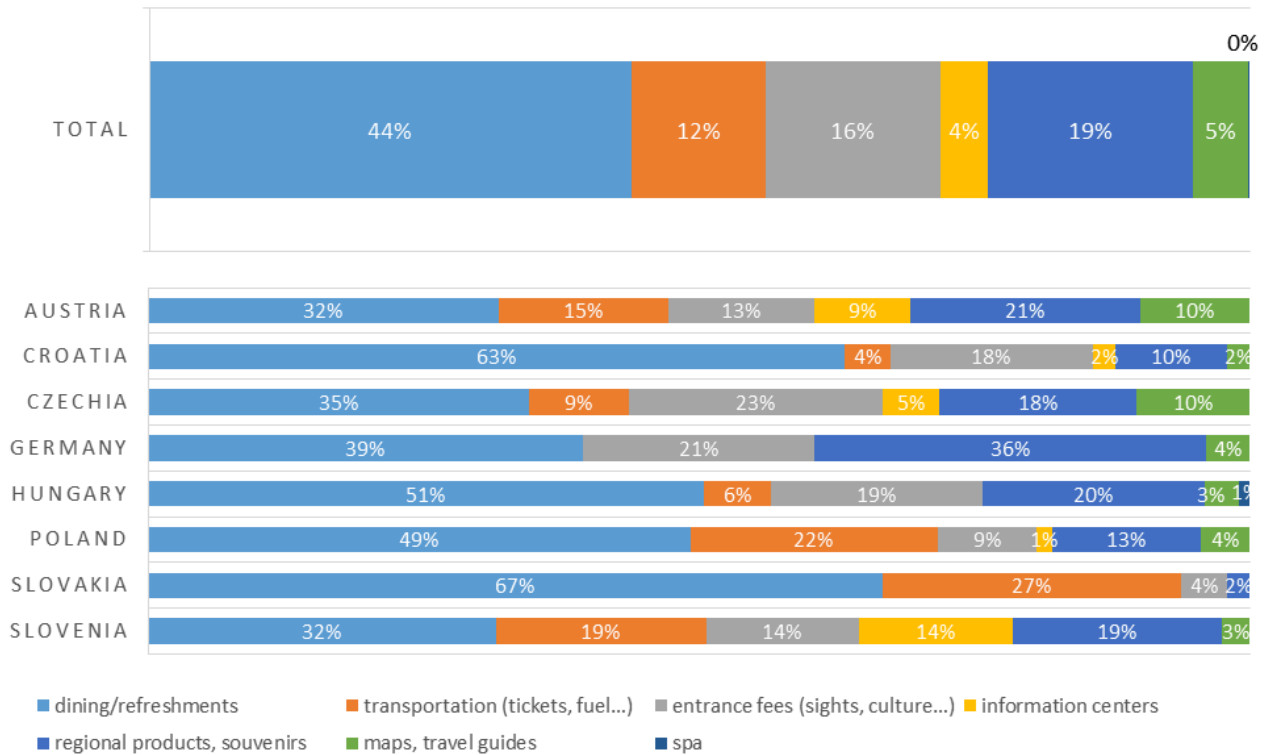
Graph 17 shows that 28.4% of respondents ride an electric bike, while 71.6% use classic bicycles. The relatively high share of e-bikes indicates growing accessibility for older or less physically trained cyclists. This trend may increase the diversity of future EuroVelo 13 users. Service infrastructure should adapt by offering charging opportunities. Overall, e-mobility is becoming an important component of cycling tourism.

Graph 18: Bike trailer? (N = 275)



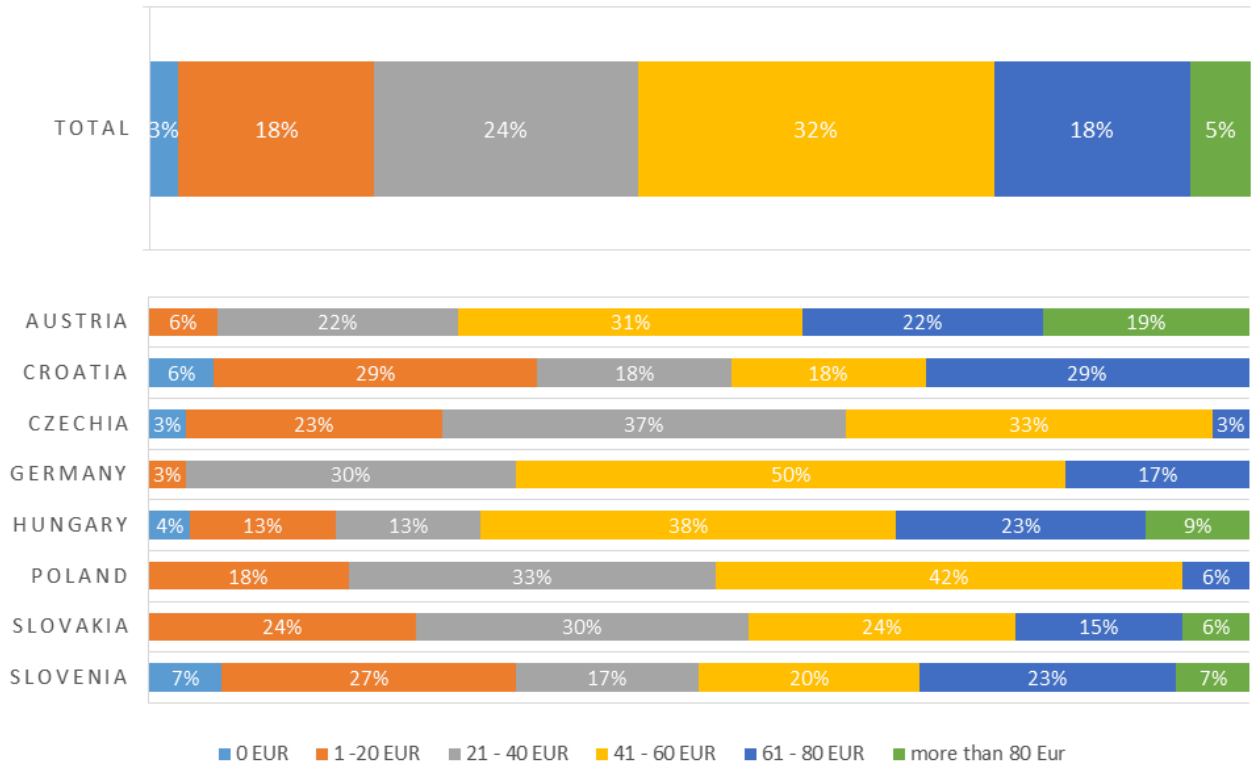
Graph 18 shows that bike trailer usage is extremely limited. Only a very small number of cyclists reported travelling with trailers. This suggests that EuroVelo 13 is mainly used for lightweight and individual touring rather than family logistics or cargo cycling. The low prevalence may reflect route conditions or travel style preferences. Trailer-friendly infrastructure is therefore not a primary demand factor.

Graph 19: What services/goods do you buy on your bike trip/vacation along the EuroVelo 13 - Iron Curtain Trail? (N = 275)



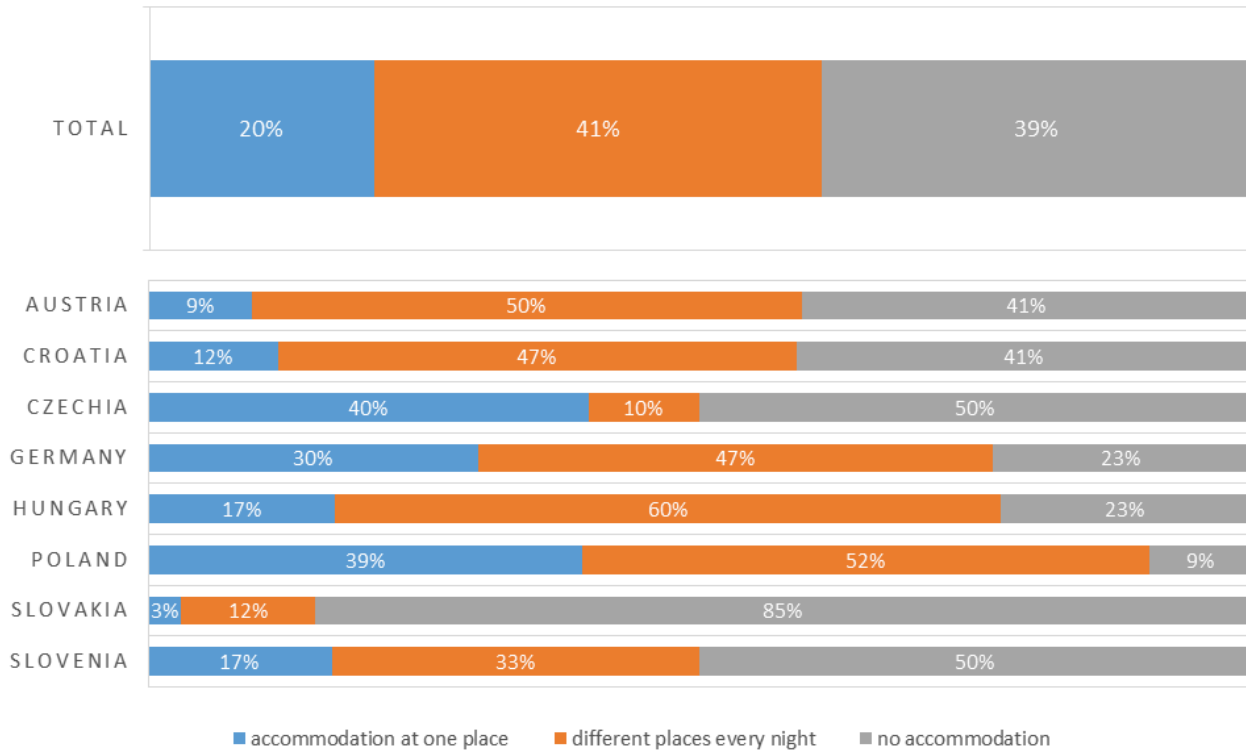
Graph 19 indicates that dining and refreshments represent the most common expenditure (44%). Entrance fees for sights and cultural attractions (16%) and regional products or souvenirs (19%) are also relevant. Transportation costs account for 12%, while spa services and information centres remain marginal. The results highlight the economic importance of gastronomy along EuroVelo 13. Local food services are therefore key tourism beneficiaries.

Graph 20: What are your average expenses per 1 day per 1 person for both services and goods?



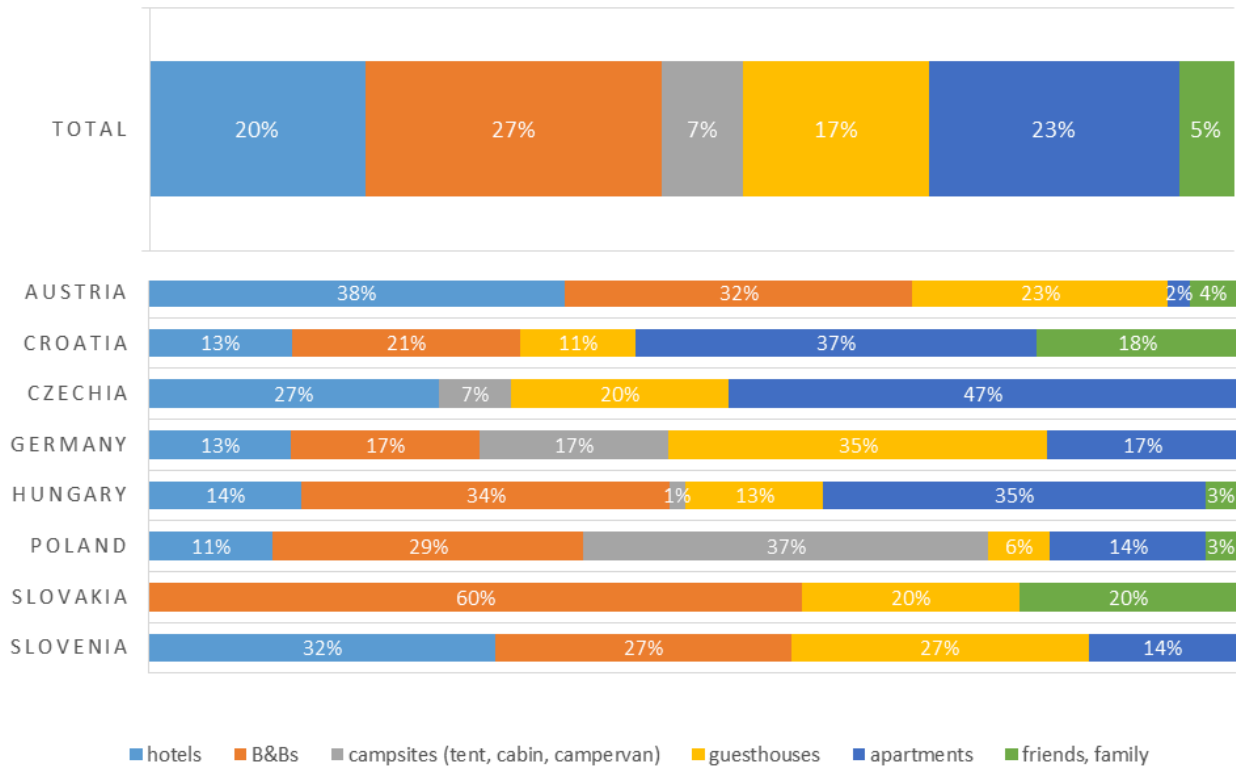
Graph 20 shows that most cyclists spend between 21-40 EUR or 41-60 EUR per day. Very low spending below 20 EUR and high spending above 80 EUR occur less frequently. This indicates a moderate expenditure profile typical for cycling tourism. The data suggests that EuroVelo 13 attracts cost-conscious but economically relevant visitors. Local businesses can expect steady mid-range tourist spending.

Graph 21: Where do you stay for a night?



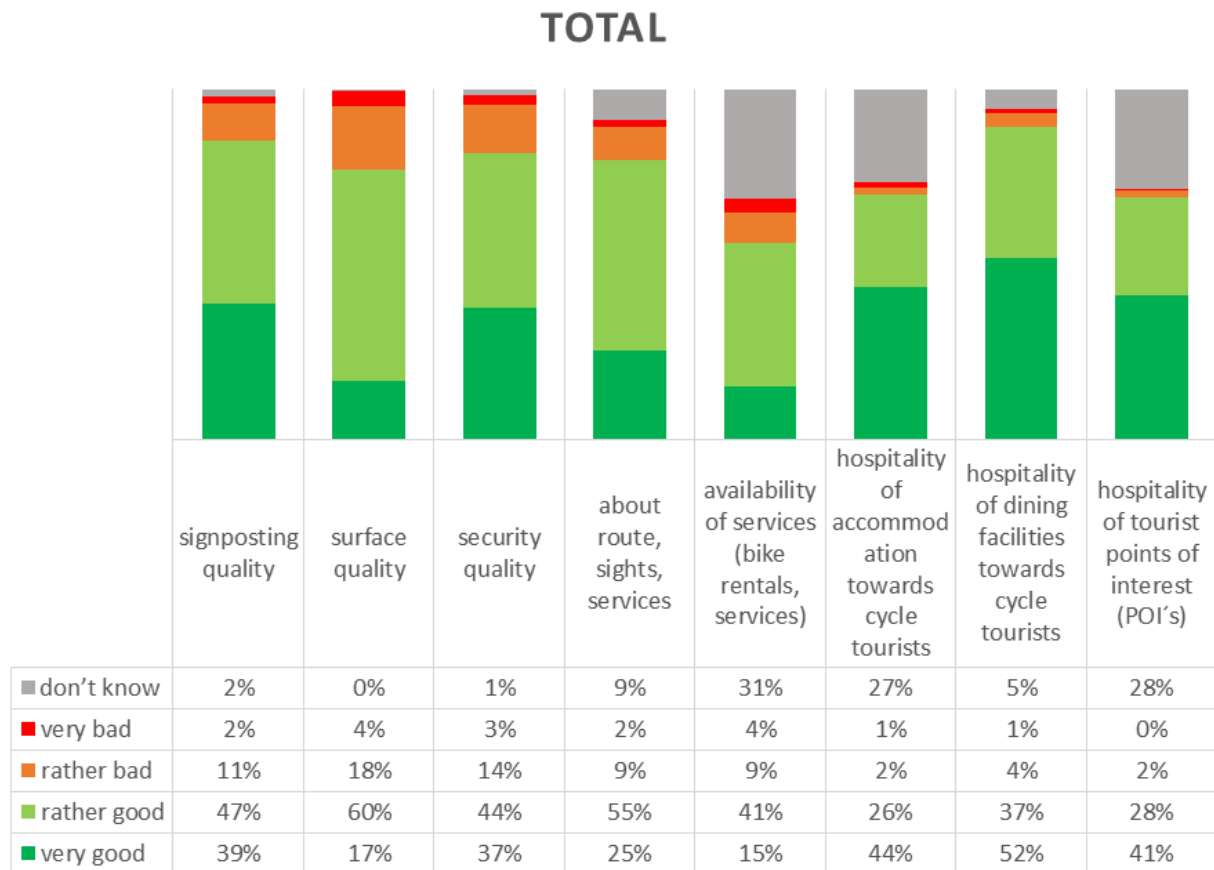
Graph 21 reveals that most cyclists stay in different places every night (41%). Accommodation at one fixed location is less common, while 39% report no accommodation use at all. This reflects the dynamic, stage-based touring character of EuroVelo 13. Cyclists tend to move continuously along the route rather than staying in one destination. Service networks should therefore be distributed לאורך the corridor.

Graph 22: What type of accommodation do you mostly use during your trip? (N = 182; Austria 23; Croatia 26; Czechia 14; Germany 30; Hungary 47; Poland 30; Slovakia 5; Slovenia 15)



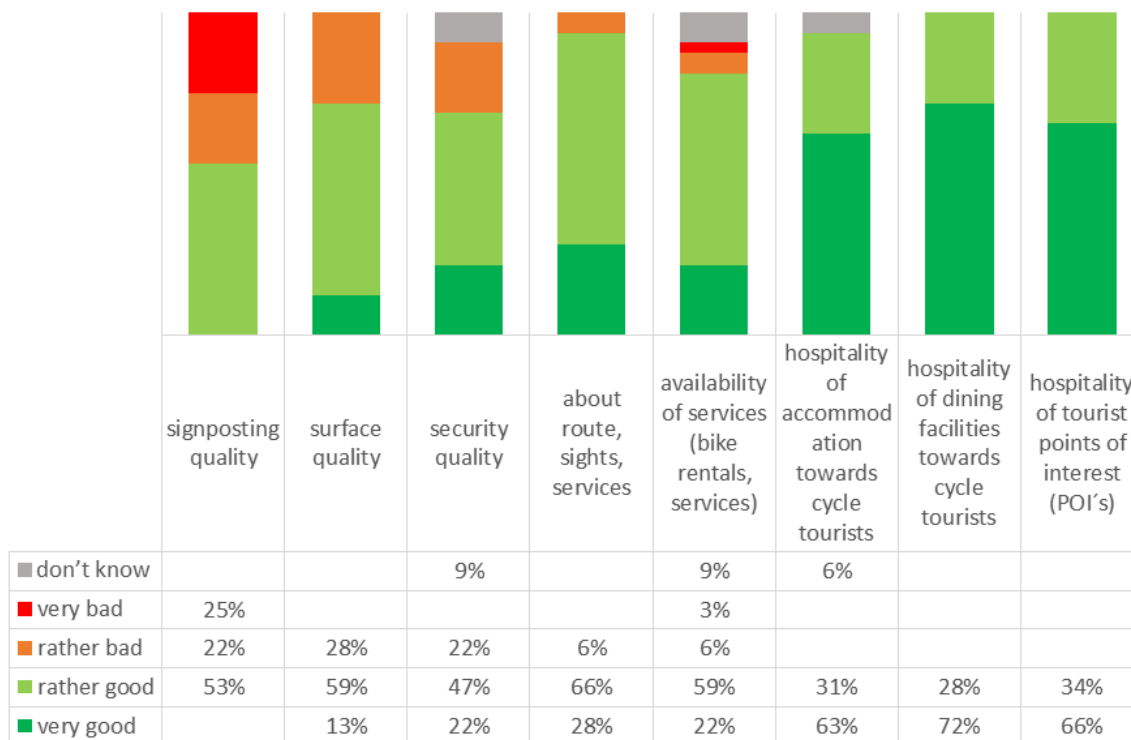
Graph 22 shows that hotels and B&Bs represent the most frequently used accommodation types. Guesthouses and apartments also play an important role, while campsites account for a smaller share. Staying with friends or family is relatively rare. This indicates that EuroVelo 13 cycling tourism relies primarily on formal accommodation providers. Ensuring bike-friendly lodging capacity is therefore essential.

Graph 23: How would you evaluate the characteristics of cycle tourism along EV 13 - Iron Curtain Trail? (N = 275)

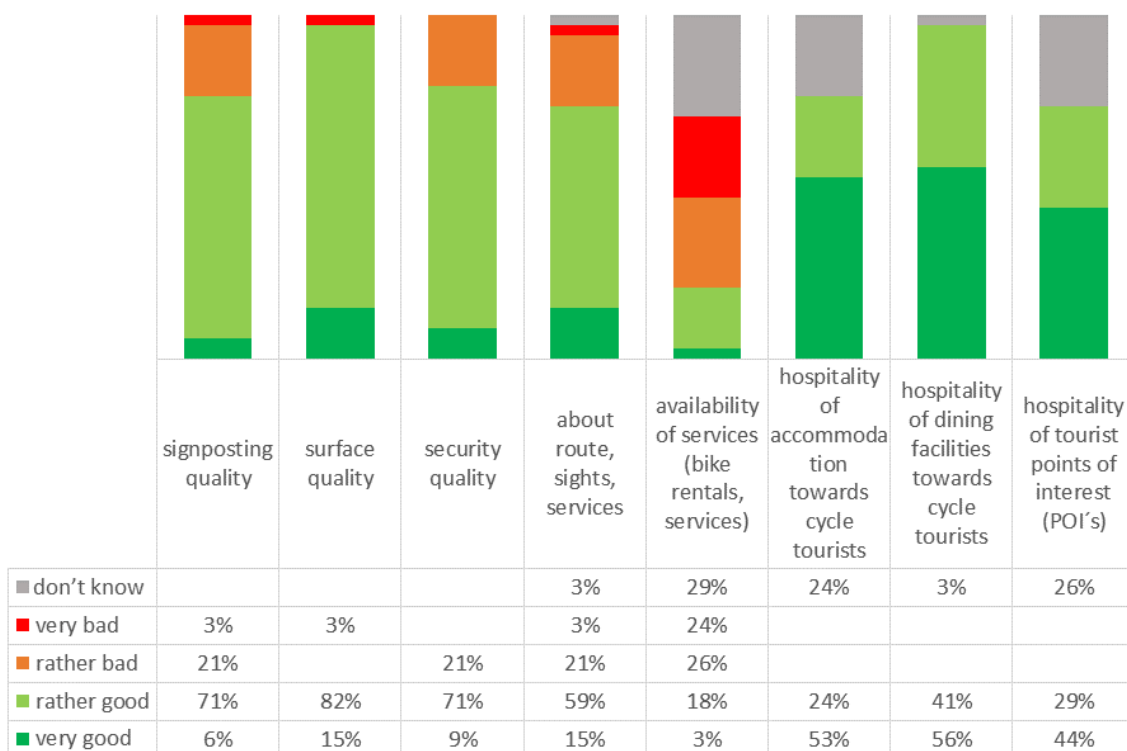


Graph 23 demonstrates generally positive perceptions of EuroVelo 13 infrastructure and hospitality. Most respondents rate signposting, surface quality and security as rather good or very good. Hospitality of accommodation and dining facilities receives particularly strong evaluations, with high “very good” shares. Negative ratings remain limited, although service availability shows slightly more uncertainty. Overall, satisfaction with the route experience is high.

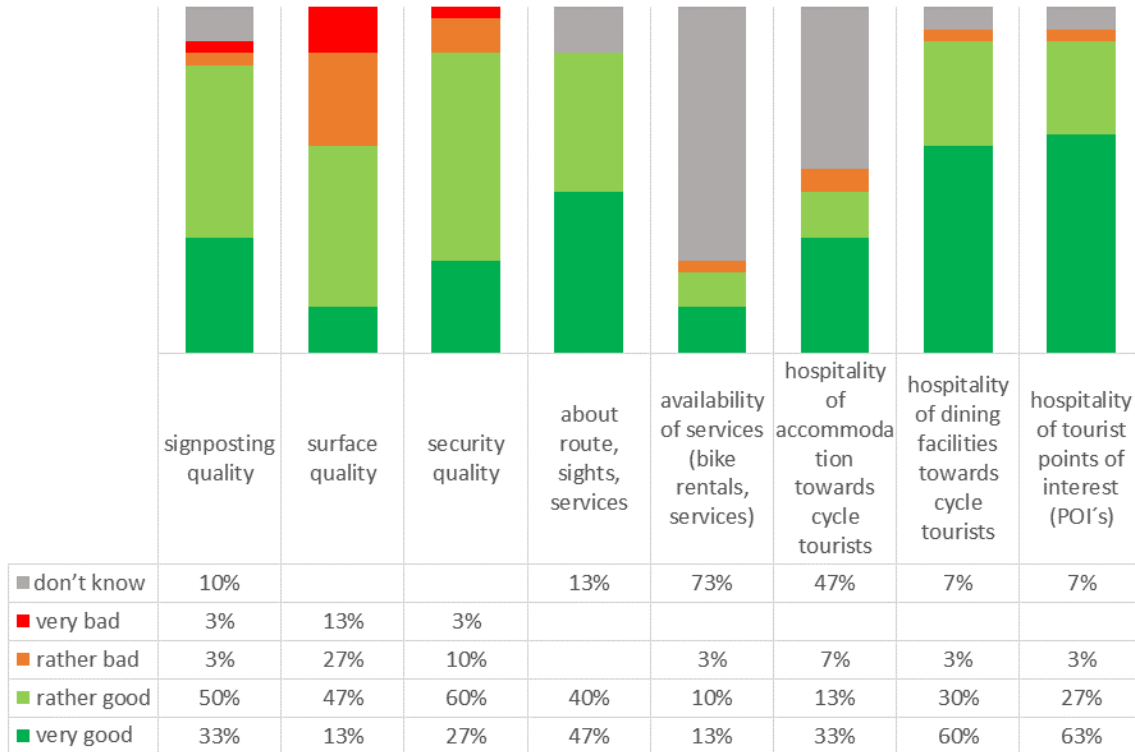
AUSTRIA



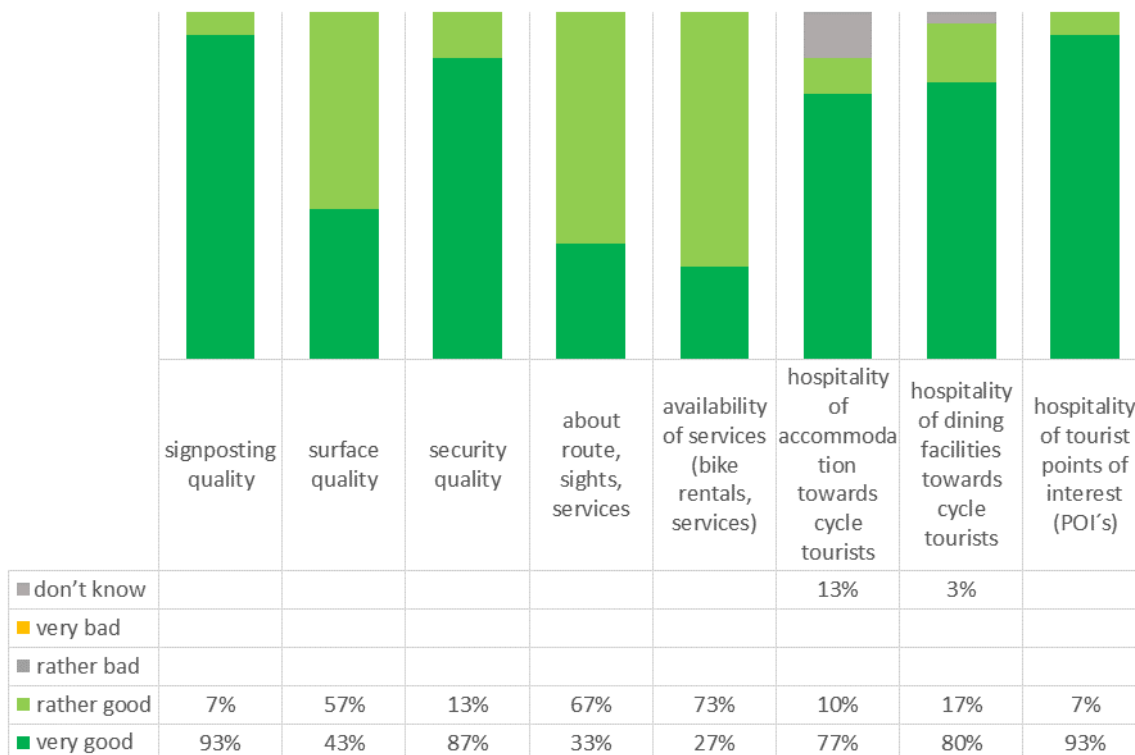
CROATIA



CZECHIA



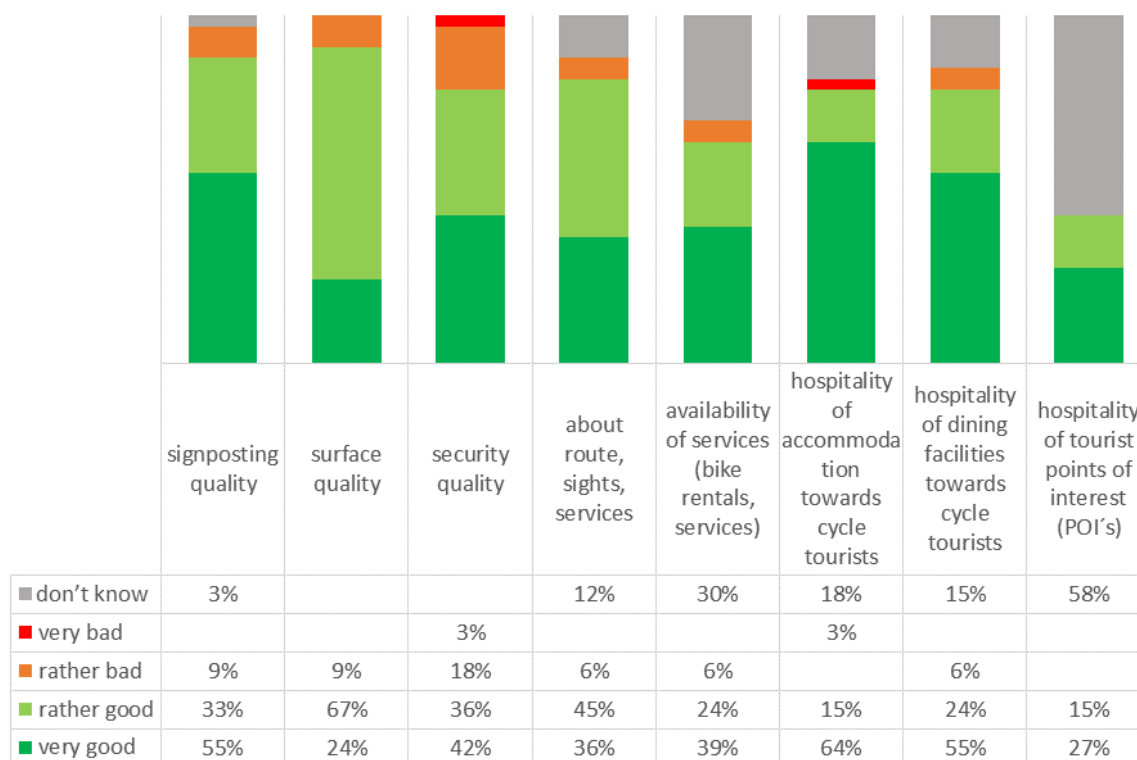
GERMANY



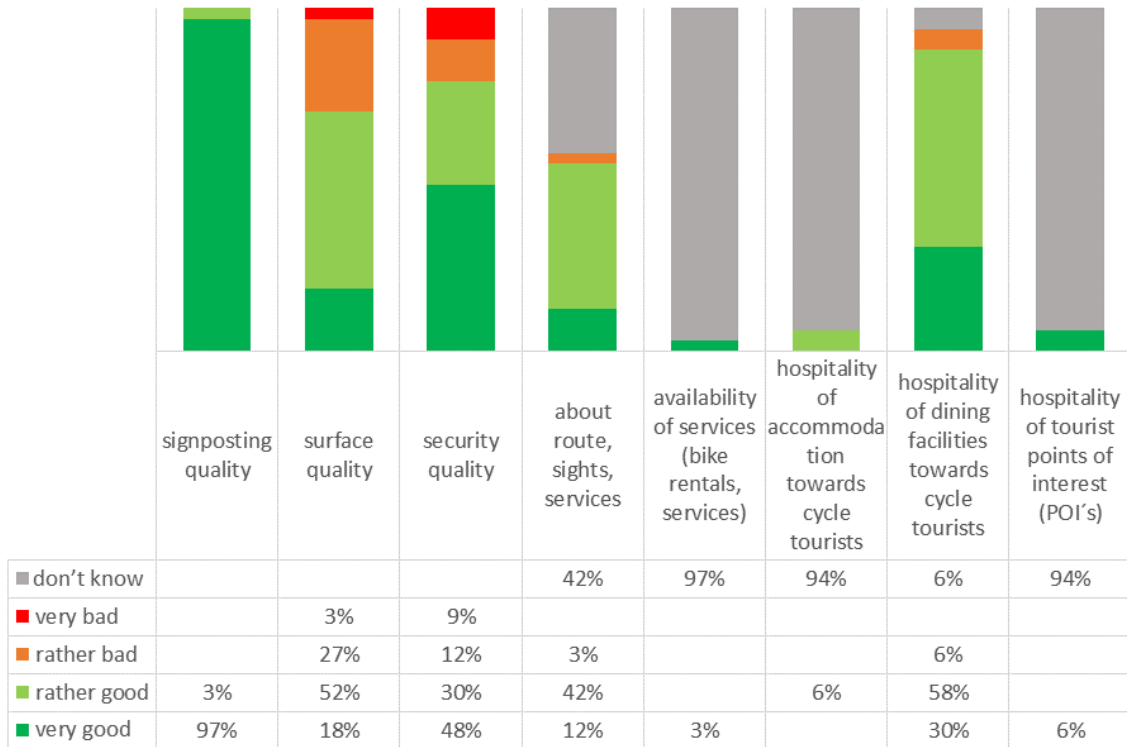
HUNGARY



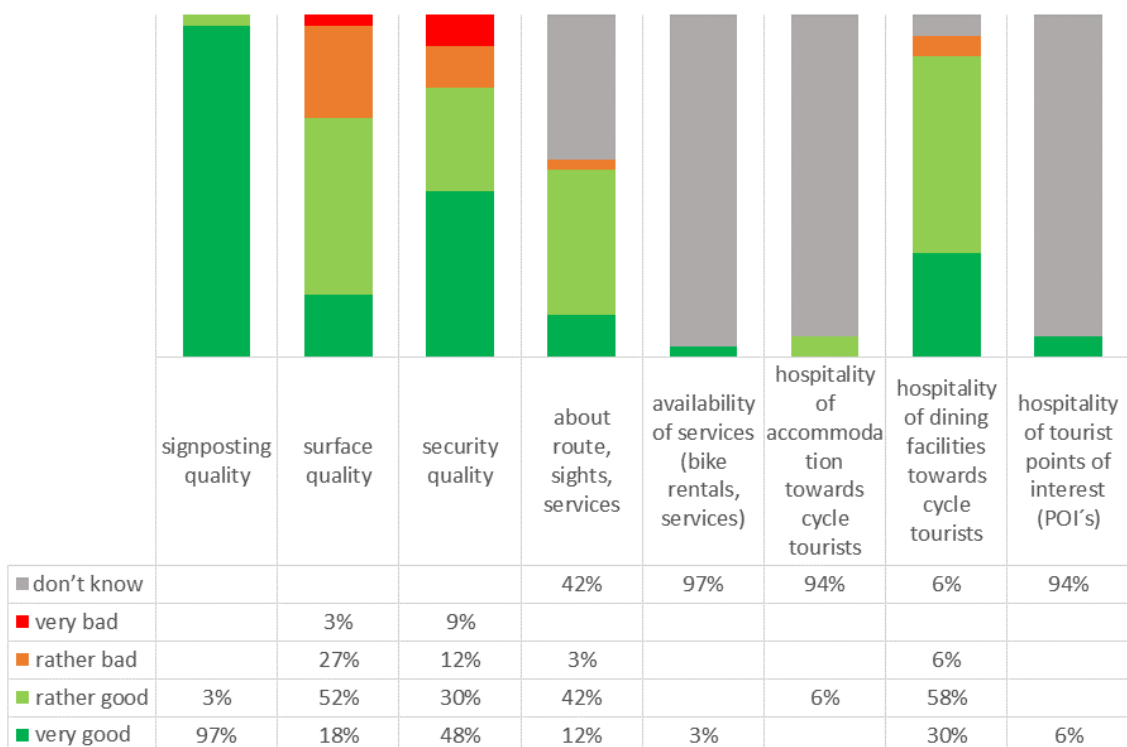
POLAND



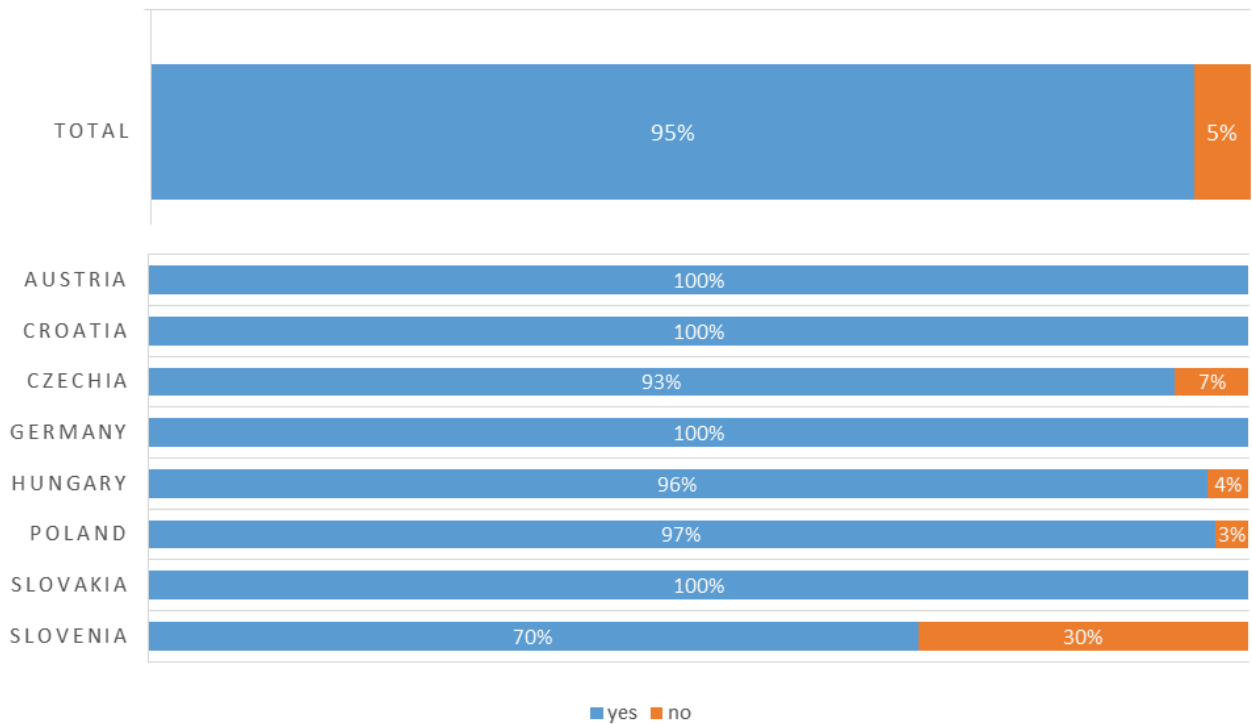
SLOVAKIA



SLOVENIA



Graph 24: Are you going to visit the EuroVelo 13 - Iron Curtain Trail on bike again? (N = 275)



Graph 24 shows a very high intention to revisit EuroVelo 13. Overall, 95% of respondents plan to return, while only 5% do not. This indicates strong satisfaction and high loyalty among EuroVelo 13 cyclists. Only in Slovenia there is a quite high rate of respondents who do not intend to come again (30%).

6. EXECUTIVE SUMMARY AND RECOMMENDATIONS

6.1 Executive summary

This executive summary highlights the 20 most significant findings from the cross-border visitor survey conducted along EuroVelo 13. The results provide strategic insight into visitor profile, behaviour, spending patterns, satisfaction and growth potential:

1. **Strong Repeat Intention** - 95% of respondents plan to visit EuroVelo 13 again, indicating exceptionally high satisfaction and loyalty potential.
2. **Core Market: 30-59 years old** - 72% of cyclists are aged 30-59, representing economically active, mid-to-high spending visitors.
3. **Predominantly Male Market** - 69% male vs. 31% female, indicating clear growth potential among female cyclists.
4. **Highly Independent Travelers** - 91% organize trips themselves, confirming EuroVelo 13 as a self-planned, independent cycling destination.
5. **Multi-Day Tourism is Significant** - nearly half of all respondents (49%) undertake multi-day trips, while 30% ride one-day trips.
6. **Nature and Active Tourism Dominate Motivation** - top motivations: Nature/countryside (28%), Active tourism/sport (28%), Sights/history (20%) - the route is primarily perceived as a nature-based active experience rather than purely historical.
7. **Couples and Small Groups Prevail** - 37% travel with partner, 31% with friends - most common group size: 2 persons - EuroVelo 13 is largely a couple-based cycling product.
8. **Digital Navigation is Standard** - 60% use electronic maps/apps, while only 10% rely on printed maps - digital optimization is mission-critical.
9. **Komoot is the Leading Planning Tool** - among app users, Komoot is the dominant platform, followed by Google Maps and [Mapy.com](https://www.mapy.com).
10. **Car Access Still Dominates** - 34% arrive by car, 29% by train, 27% by bike - rail access is strong but underutilized.
11. **E-Bikes Are a Growing Segment** - 28.4% use electric bikes, with significantly higher shares in some countries - the e-bike segment is strategic for future growth.
12. **Mid-Range Daily Spending** - most common daily spending: €21-40 and €41-60 - EuroVelo 13 attracts mid-spending active tourists, not low-budget backpackers.
13. **Food & Beverage is the Main Economic Driver** - 44% spend primarily on dining/refreshments, making gastronomy the strongest local economic impact.

14. **Camping is Structurally Important** - 23% use campsites, alongside B&Bs (27%) and hotels (20%) - cyclists value flexible and affordable accommodation types.
15. **Frequent Overnight Movement** - 41% change accommodation daily, confirming EuroVelo 13 as a touring corridor, not just a base destination.
16. **Hospitality Scores Very High** - accommodation and dining facilities receive the highest satisfaction ratings - cyclists feel welcomed.
17. **Surface Quality Needs Improvement** - surface quality shows the highest variability and dissatisfaction in several countries - infrastructure investment should prioritize surface consistency.
18. **Service Availability is Uneven** - availability of bike services (repair, rental) is weaker compared to hospitality ratings.
19. **Signposting Generally Rated Good** - most respondents evaluate signposting as “rather good” or “very good”, but consistency varies by country.
20. **Strong Regional Balance Across 8 Countries** - participation is evenly distributed across Austria, Croatia, Czechia, Germany, Hungary, Poland, Slovakia and Slovenia, confirming EuroVelo 13’s function as a true cross-border corridor.

Strategic Takeaway

EuroVelo 13 is a highly loyal, digitally navigated, mid-spending, independent cycling corridor with strong hospitality perception and clear growth potential in:

- Female participation
- E-bike users
- Rail-integrated tourism
- Service density improvement
- Digital ecosystem integration

The key development focus should shift from awareness-building to service enhancement, digital optimization, and structured multi-day product development.

6.2 EuroVelo 13 - Iron Curtain Trail Management Recommendations

Based on the survey findings, below are **10 strategic management recommendations** for EuroVelo 13. These focus on infrastructure quality, service ecosystem, cross-border coordination, and long-term competitiveness:

1. **Introduce a unified cross-border quality standard**
A harmonized infrastructure and service standard will ensure a consistent cycling experience across all participating countries.
2. **Prioritize improvement of surface quality on weak sections**
Addressing uneven or poor surfaces will significantly enhance comfort, safety, and overall visitor satisfaction.

3. **Increase the density of cycling-related services along the route**
More repair points, rentals, and certified bike-friendly facilities will strengthen the reliability of the corridor.
4. **Develop and maintain a high-quality digital navigation ecosystem**
Accurate GPX tracks and integration with major cycling platforms are essential since most users rely on digital tools.
5. **Strengthen bike-and-rail integration**
Improving coordination with rail operators will reduce car dependency and make the route more accessible and sustainable.
6. **Structure the route into clearly defined multi-day stages**
Official stage concepts will help cyclists plan longer trips and increase average length of stay.
7. **Prepare strategically for the growth of e-bike users**
Expanding charging infrastructure and adapting services will capture a rapidly growing and higher-spending segment.
8. **Enhance safety communication and female-friendly positioning**
Clear messaging about safety and comfort can help increase participation among women cyclists.
9. **Implement a permanent monitoring and data collection system**
Regular visitor surveys and automatic counters will enable data-driven decision-making and performance tracking.
10. **Establish a long-term cross-border governance framework**
A formal coordination structure will ensure strategic continuity beyond short-term projects and funding cycles.

6.3 EuroVelo 13 - Iron Curtain Trail Marketing Recommendations

Based on survey findings we have identified **10 key marketing recommendations** for DMO's:

1. **Position EuroVelo 13 primarily as a nature-based active experience**
Since nature and active tourism are the strongest motivations, marketing should emphasize landscapes, freedom, and physical experience rather than only historical themes.
2. **Strengthen storytelling around "Cycling through Europe's history"**
While nature dominates motivation, integrating the Iron Curtain narrative can differentiate EuroVelo 13 from competing long-distance routes.
3. **Focus marketing on the 30-59 age segment**
This economically active group represents the core market and should be the primary target of communication campaigns.
4. **Develop dedicated campaigns for female cyclists**
With only 31% female participation, tailored messaging around safety, comfort, and couple travel can expand this segment.

5. **Leverage Komoot and other digital cycling platforms**
Since most users rely on digital navigation, visibility and partnerships on leading apps are critical for reach and credibility.
6. **Promote multi-day stage itineraries instead of the full corridor only**
Clearly packaged 3-7 day segments make the route more accessible and easier to plan for independent cyclists.
7. **Highlight gastronomy as a key travel benefit**
As dining is the largest spending category, showcasing regional food experiences can increase economic impact and attractiveness.
8. **Promote bike-and-rail accessibility in campaigns**
Emphasizing sustainable and convenient train access can attract environmentally conscious and car-free travelers.
9. **Target the growing e-bike segment explicitly**
Marketing should communicate charging availability, moderate gradients, and comfort to appeal to the 28% and growing e-bike users.
10. **Build a loyalty concept around “Return to Complete the Trail”**
Given the 95% repeat intention, campaigns encouraging cyclists to ride additional sections can increase long-term engagement and repeat visits.

ANNEX I - STANDARDIZED COUNTER AND DATA EVIDENCE

Country	CZECHIA			
Counter_ID	EV13-CZ-001	EV13-CZ-002	EV13-CZ-003	EV13-CZ-004
Location_name	Špičák (CZ)	Slavonice (CZ)	Lukov (CZ)	Mikulov (CZ)
GPS_lat	49.1828073798405	48.9897578294668	48.8529558291603	48.786891090415
GPS_lon	13.2158703128107	15.3575283451175	15.9119247751895	16.6522224001748
Location_type	Rural	Suburban	Rural	Suburban
Device_type	Eco-Counter MULTI	Eco-Counter MULTI	Eco-Counter MULTI	Eco-Counter MULTI
Detection_technology	Pyroelectric sensor + Inductive loops	Pyroelectric sensor + Inductive loops	Pyroelectric sensor + Inductive loops	Pyroelectric sensor + Inductive loops
Traffic_type	Cyclists, pedestrians	Cyclists, pedestrians, cars	Cyclists, pedestrians, cars	Cyclists, pedestrians, cars
Directional_detection	Yes	Yes	Yes	Yes
Data_available_from	2020-01-01	2020-01-01	2020-01-01	2020-01-01
Data_available_to	2024-12-31	2024-12-31	2024-12-31	2024-12-31
Data_frequency	Hourly	Hourly	Hourly	Hourly
Data_owner	Partnerství, o.p.s.	JCCR	Partnerství, o.p.s.	Partnerství, o.p.s.
Data_publicity	Yes	Yes	Yes	Yes

Country	HUNGARY		
Counter_ID	EV13-HU-001	EV13-HU-002	EV13-HU-003
Location_name	Hidegség (HU)	Sopron - Tomálom (HU)	Sopron - Kemping (HU)
GPS_lat	47.6235503	47.7084717	47.6470156
GPS_lon	16.7496453	16.6524944	16.5811286
Location_type	Rural	Suburban	Suburban
Device_type	Eco-Counter ZELT	Eco-Counter ZELT	Eco-Counter ZELT
Detection_technology	Inductive loops	Inductive loops	Inductive loops
Traffic_type	Cyclists	Cyclists	Cyclists
Directional_detection	Yes	Yes	Yes
Data_available_from	2020-01-01	2020-01-01	2023-01-01
Data_available_to	2024-12-31	2024-12-31	2024-12-31
Data_frequency	Hourly	Hourly	Hourly
Data_owner	Győr-Moson-Sopron County	Győr-Moson-Sopron County	Győr-Moson-Sopron County
Data_publicity	Yes	Yes	Yes

Country	POLAND				
Counter_ID	EV13-PL-001	EV13-PL-002	EV13-PL-003	EV13-PL-004	EV13-PL-005
Location_name	Dartowo (PL)	Sarbinowo (PL)	Rogowo (PL)	Kołczewo (PL)	Świnoujście (PL)
GPS_lat	54.41148991070351	54.2456078466128	54.15462697433577	53.97981213354322	53.92647771906602
GPS_lon	16.396254000486984	15.9280197011678	15.376988115990004	14.62919890869671	14.226176703994469
Location_type	Suburban	Rural	Rural	Rural	Suburban
Device_type	Eco-Counter ZELT	Eco-Counter ZELT	Eco-Counter ZELT	Eco-Counter ZELT	Eco-Counter ZELT
Detection_technology	Inductive loops	Inductive loops	Inductive loops	Inductive loops	Inductive loops
Traffic_type	Cyclists	Cyclists	Cyclists	Cyclists	Cyclists
Directional_detection	Yes	Yes	Yes	Yes	Yes
Data_available_from	2020-01-01	2020-01-01	2020-01-01	2022-01-01	2020-01-01
Data_available_to	2024-12-31	2024-12-31	2024-12-31	2024-12-31	2024-12-31
Data_frequency	Hourly	Hourly	Hourly	Hourly	Hourly
Data_owner	Województwo Zachodniopomorskie	Województwo Zachodniopomorskie	Województwo Zachodniopomorskie	Województwo Zachodniopomorskie	Województwo Zachodniopomorskie
Data_publicity	Yes	Yes	Yes	Yes	Yes

Country	POLAND			
Counter_ID	EV13-PL-006	EV13-PL-007	EV13-PL-009	EV13-PL-009
Location_name	Kmiecin (PL)	Poddąbie (PL)	Puck - Kaczy Winkiel (PL)	Gdańsk Wyspa Sobieszewska (PL)
GPS_lat	54,1887016935309	54,623037802455	54,7301703571071	54,3399333410652
GPS_lon	19,1491592680409	16,988430765485	18,3933360241381	18,887846187118
Location_type	Urban	Rural	Rural	Suburban
Device_type	Eco-Counter ZELT	Eco-Counter ZELT	Eco-Counter ZELT	Eco-Counter ZELT
Detection_technology	Inductive loops	Inductive loops	Inductive loops	Inductive loops
Traffic_type	Cyclists	Cyclists	Cyclists	Cyclists
Directional_detection	No	No	No	No
Data_available_from	2020-01-01	2020-01-01	2020-01-01	2021-01-01
Data_available_to	2024-12-31	2024-12-31	2024-12-31	2024-12-31
Data_frequency	Hourly	Hourly	Hourly	Hourly
Data_owner	Województwo Pomorskie	Województwo Pomorskie	Województwo Pomorskie	Województwo Pomorskie
Data_publicity	Yes	Yes	Yes	Yes

Country	SLOVAKIA				
Counter_ID	EV13-SK-001	EV13-SK-002	EV13-SK-003	EV13-SK-004	EV13-SK-005
Location_name	Piesočná (SK)	Vysoka pri Morave (SK)	Vysomarch (SK)	Cyklomost Slobody (SK)	Devinska Nova Ves (SK)
GPS_lat	48.59878119207606	48.297430976111244	48.27915535041147	48.21065	48.197825534428304
GPS_lon	16.95320248603821	16.9260210245746	16.919406652450565	16.969	16.972652288368394
Location_type	Rural	Rural	Rural	Suburban	Suburban
Device_type	Eco-Counter ZELT	Eco-Counter ZELT	Eco-Counter ZELT	Eco-Counter MULTI	Eco-Counter ZELT
Detection_technology	Inductive loops	Inductive loops	Inductive loops	Pyroelectric sensor + Inductive loops	Inductive loops
Traffic_type	Cyclists	Cyclists	Cyclists	Cyclists, pedestrians	Cyclists
Directional_detection	Yes	Yes	Yes	Yes	Yes
Data_available_from	2023-01-01	2023-01-01	2020-01-01	2020-01-01	2020-01-01
Data_available_to	2024-12-31	2024-12-31	2024-12-31	2024-12-31	2024-12-31
Data_frequency	Hourly	Hourly	Hourly	Hourly	Hourly
Data_owner	Trnava Region	Bratislava Region Tourism	Bratislava Region Tourism	Bratislava Region Tourism	Bratislava Region Tourism
Data_publicity	Yes	Yes	Yes	Yes	Yes

ANNEX II - QUESTIONNAIRE

QUESTIONNAIRE – CYCLE TOURISM ALONG THE EUROVELO 13 – IRON CURTAIN TRAIL

We kindly ask you to fill in this questionnaire, which aims to monitor the current state of cycle tourism along the EuroVelo 13 – Iron Curtain Trail. Please, fill in or circle the answer that best describes your situation or opinion. It will take only 5 – 10 minutes. Thank you!

Date and time: City and country:

1. **How long is your cycling trip along the EuroVelo 13 – Iron Curtain Trail?**
 half-day trip one-day trip multi-day trip, number of days:.....

2. **Where did you start from and where will you end your trip along the EuroVelo 13 – Iron Curtain Trail?**
 Start (city/country): End (city/country):

3. **What is the main interest of your trip along the EV 13 – Iron Curtain Trail? (more answers possible)**
 sights/history nature/countryside active tourism/sport
 local gastronomy health/spa cultural/sport events
 family visit business trip shopping
 other, please specify:.....

4. **Now you are riding with: (more answers possible)**
 alone my partner my family my friends
 other, please specify: **Number of people in your group:**

5. **Did you organise the trip yourselves or did you use a travel agency?**
 ourselves (private trip) travel agency (organised trip)

6. **Where did you get the information for planning your trip/vacation? (more answers possible)**
 official web sites: www.eurovelo.com newspapers/magazines
 other web sites: friends
 social networks (Facebook, Instagram, YouTube etc.) TV
 information centres radio
 maps/guide books tourism/travel fairs
 other, please specify:

7. **How often do you ride a bike along the EuroVelo 13 – Iron Curtain Trail?**
 first time several times in my life several times a year
 several times a month several times a week (almost) daily

8. **What's the average daily distance of your cycling trip?**
 up to 30 kms 30 – 49 kms 50 – 69 kms 70 kms or more

9. **What type of navigation do you use along the EuroVelo 13 – Iron Curtain Trail? (more answers possible)**
 electronic map/app, name of the map/app:
 printed maps trail signposting I know the way

10. How did you mostly get to the EuroVelo 13 – Iron Curtain Trail?

- by train by bus by bike by car other, please specify:

11. What type of bike do you ride?

- road bike trekking bike gravel bike mountain bike city bike
 other, please specify: **Mark separately:** electric bike bike trailer

12. What services/goods do you buy on your bike trip/vacation along the EuroVelo 13 – Iron Curtain Trail?
(more answers possible)

- accommodation information centers
 dining/refreshments regional products, souvenirs
 transportation (tickets, fuel...) maps, travel guides
 entrance fees (sights, culture...) sport facilities (fitness etc.)
 other, please specify:

13. What are your average expenses per 1 day per 1 person for both services and goods?

- 0 EUR 1 -20 EUR 21 - 40 EUR 41 - 60 EUR 61 - 80 EUR
 more than 80 EUR, please specify: EUR

14. Where do you stay for a night?

- accommodation at one place different places every night no accommodation

15. What type of accommodation do you mostly use during your trip?

- hotels B&Bs campsites (tent, cabin, campervan) guesthouses
 apartments friends, family other, please specify:

16. How would you evaluate the characteristics of cycle tourism along EV 13 – Iron Curtain Trail?

characteristics	very good	rather good	rather bad	very bad	don't know
signposting quality	1	2	3	4	5
surface quality	1	2	3	4	5
security quality	1	2	3	4	5
availability of information (about route, sights, services)	1	2	3	4	5
availability of services (bike rentals, services)	1	2	3	4	5
hospitality of accommodation towards cycle tourists	1	2	3	4	5
hospitality of dining facilities towards cycle tourists	1	2	3	4	5
hospitality of tourist points of interest (POI's)	1	2	3	4	5

17. What in your opinion should be improved along the EuroVelo 13 and how would you improve it?

18. Are you going to visit the EuroVelo 13 - Iron Curtain Trail on bike again?

- yes no

19. You're: male female other

20. How old are you (years)?

- 15 – 19 20 – 29 30 – 44 45 – 59 60 or more

21. Your place of residence: Country: City:

Thank you and enjoy your ride along EuroVelo 13 - Iron Curtain Trail!