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ANALYSIS OF CYCLING TOURISM: CASE-STUDY CROATIA

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Abstract: Cycling is one of the sustainable forms of transport that has a positive impact on health and the environment. Cycling tourism is becoming increasingly popular and it contributes a significant portion to tourism revenues. Cycle tourists are ideal for the development of rural and outlying areas. Croatia has numerous advantages for the development of this type of tourism, such as cultural and historical heritage, climate, environment etc. Research has shown that cycling tourism is only meagrely developed in Croatia. Analysis of four counties in Croatia has shown that the weighted average number of accommodation establishments per route/path is 0.90 i.e. that, on average, there is less than one establishment per route/path. It has also shown that the weighted average number of accommodation establishments per 100 kilometres of cycle path is 2.80, which means that, on average, there is one accommodation establishment per 35.71 kilometres and that the weighted average route length for all of the observed counties together is 32.26 kilometres.

Keywords: cycling tourism, development analysis, Republic of Croatia.

1. Introduction and Literature Overview

Tourism is an important sector of service economy. The last 70 years have witnessed a growth in tourism due to social, cultural and economic changes in society (Vujko *et al.,* 2013). Technological development, reduction in work hours and annual leave have directed the focus of the people towards their personal skills and activities that bring them pleasure during their leisure time. One such activity is cycling tourism which has been gaining significance. Cycling tourism is often mentioned in connection with adventure, sports tourism, special interest tourism, nature tourism, rural and sustainable tourism (Duran *et al.,* 2018). There are several definitions of cycling tourism. Cycling tourism refers to traveling per bicycle between places for the purpose of entertainment, where cycling is an integral part of the tourist experience (Mrnjavac *et al.,* 2014). Cycling tourism refers to trips in the minimum distance of 40 kilometres from home, with an overnight stay (for trips including an overnight stay), or trips that include at least one non-cycling component of the round trip of 50 kilometres and at least four hours outside of the house (for one-day trips), where cycling is the main purpose of the trip, including active participation or passive observation, rest and relaxation, leisure time and/or competition (Lamont, 2014). Sustrans, a charity organisation in the United Kingdom that promotes walking and cycling, defines cycling tourism as a recreational one-day visit or one with an overnight stay away from home, that includes cycling as a basic and important part of the visit (Mrnjavac *et al.,* 2014). Cycling tourism

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is tourism that includes the watching of a cycling event, participation in it or participation in an independent or organised cycling tour (Chiu and Leng, 2017). According to Lamont, the classic definitions include the following six characteristics of cycling tourism: the cycling experience takes place away from the person's region of origin, cycling tourism may be extended to one-day or multi-day trips, the cycling activity is not competitive in nature, cycling should be the main purpose of the trip, there must be active participation in the cycling activity, cycling tourism is a form of rest and relaxation or entertainment (Chiu and Leng, 2017).

Cycling is among the sustainable forms of transport and has a positive impact on health and the environment. The use of a bicycle as a means of transport can be helpful with reducing traffic congestion and noise and air pollution. Short-distance cycling trips are a relatively fast and cost-effective means of transport that are available to the majority of the population (Ilies *et al.,* 2013). Cycling tourism includes cycling trips on a specific route with the aim of exploring the destination, for the purpose of athletic activity, adventure seeking, physical, mental and spiritual relaxation, entertainment, being closer to nature etc. Cycling tours are becoming increasingly popular in European countries and cycling tourism constitutes an increasingly significant share in tourism revenues (Duran *et al.,* 2018). Europe represents a good destination for cycle tourists (Piket *et al.,* 2011). The first recorded research on cycling tourism was conducted in Denmark in 1995 on the Fyn and Bomholm islands. The research showed that the islands were regularly visited by 53,000 cycle tourists with 477,000 overnight stays (Duran *et al.,* 2018). A research conducted in 1997 in the United Kingdom estimated the value of cycling tourism at 335 million pounds per year (Ritchie and Hall, 1999). A study carried out in 2012 by the European Parliament estimated that in Europe, cycling tourism generated 2.8 billion tourist trips and approximately 20 million overnight stays and 44 billion euros of tourist spending (Duran *et al.,* 2018; Periša, 2020). According to a report issued by the European Cyclists' Federation in 2018, the economic benefits arising from cycling tourism in 28 European Union Member States were between 150 and 155 billion euros. Cycle tourists made 146 billion kilometres, reduced CO_2 emissions by 16 million tons per year, the value of the reduction in air pollution achieved through cycling was 435 million euros, the value of the reduced noise pollution was 300 million euros, while 3 billion litres of fuel were saved in the EU due to cycling, which is equivalent to the value of approximately 4 billion euros. Cycling positively impacts the quality of life and health by reducing, for example, the risk from certain diseases such as Alzheimer disease, it reduces childhood obesity and sick leave days. The value of the cycling market in 2016 amounted to around 13 billion euros, with estimated annual growth of 5.5% until 2022. Cycling tourism provides 552,000 jobs in the EU and creates more value and more jobs than cruise tourism. Each euro invested in cycling in the urban areas brings 12.3 euros of benefit and added value. The annual costs of bicycle use and maintenance are 10 or even more times lower than those for cars. In the EU, the value of traffic congestion mitigation achieved through bicycle use is estimated at 6.8 billion euros, while, due to the use of bicycles, the annual construction and maintenance costs of motorized transport are reduced by 2.9 billion euros (ECF, 2018).

The benefits that a destination can achieve through the development of cycling tourism can be identified with respect to the following aspects: (1) equal or higher spending by cycle tourists in comparison with other tourist groups, (2) creation of demand (and development of supply) for specific products and services at the destination, (3) use of services by local providers and increase of financial inflows in the local economy, (4) minimum environmental impact of this type of transport on the destination, (5) use or conversion of the existing and insufficiently utilised, worn-out or outdated infrastructure, (6) improvement of the destination's image, attracting new or different visitors, (7) increased activity of the local population and other benefits for the community arising, among other things, from a more active lifestyle (Mrnjavac *et al.,* 2014). Cycling tourists are ideal for rural and outlying areas that frequently do not have a rich tourist offer. Studies on cycling tourism have shown that the development of cycle routes on the local, regional and national levels offers possibilities for the development of local areas, i.e. country and rural regions where cycling tourism can create and/or help maintain jobs and enrich the tourist offer (Ritchie and Hall, 1999; Vujko *et al.,* 2013; Piket *et al.,* 2011). Therefore, rural areas and households compete with each other in their tourist attractions and places at which cyclists might spend their money, such as purchases in shops, bicycle service maintenance, dinner, overnight stays (Chiu and Leng, 2017; Vujko *et al.,* 2013).

2. Cycling Tourism in the Republic of Croatia

Republic of Croatia has an attractive and diverse natural environment, a rich cultural and historical heritage, a favourable climate, it is close to large markets, has good traffic connections and internal security, while there are also less frequented macadam roads and forest paths unencumbered by intense hiker demand. All of the above makes it possible for Croatia to develop its cycling tourism (Klarić *et al.,* 2015; Periša, 2020). According to data from the Ministry of Tourism and the specialised website of the cyclists' organisation Pedala, there are more than 15,000 kilometres of cycle routes in the Republic of Croatia (Cycling Tourism, 2020; Cycle Routes in Croatia, 2020) the most of which are in the Primorje – Gorski Kotar County (5,100 kilometres), Istria County (4,869.35 kilometres), Sibenik-Knin County (2,565 kilometres), Split-Dalmatia County (1,992 kilometres), Lika-Senj County (1,500 kilometres), and Medjimurje County (864 kilometres) (Cycling in Kvarner, 2020; Istria Bike, 2020; Dalmatia Sibenik Bike, 2020; Dalmatia Bike, 2020; Lika-Senj Tourist Board, 2020; Medjimurje Bike, 2020).

The EuroVelo Route 8 (Mediterranean Route), EuroVelo Route 6 (Danube Route), EuroVelo Route 9 (Baltic-Adriatic or Amber Cycle Route) and EuroVelo Route 13 (Drava Route or Iron Curtain Trail) pass through Croatia, in the total length of 1,713 kilometres (Fig.1.) (Klarić *et al.,* 2015; Periša, 2020). The EuroVelo Route 8 in Croatia passes through the regions of Istria, Kvarner, Lika and Dalmatia all the way to the Montenegrin border. The EuroVelo Route 6 in Croatia passes through two counties - Osijek-Baranja and Vukovar-Srijem, following the course of the Drava and Danube rivers. The EuroVelo Route 9 in Croatia passes through Istria County, from the Slovenian border to the city of Pula. The EuroVelo Route 13 in Croatia passes through the Medjimurje, Varazdin, Koprivnica-Krizevci, Virovitica-Podravina and Osijek-Baranja counties,

following the course of the Drava river and the border with Hungary. The main national cycle routes (marked with a D), in the total length of 2,903.2 kilometres, are: D1 Drava Route, D2 Sava Route, D3 Dinar Route, D4 Adriatic Route, D5 Moslavina and North Slavonia Route, D6 Zagorje Karolina Route, D7 Adriatic, Plitvice, Lonjsko Polje, Balaton Route, D8 Adriatic-Drava Route, D9 Neretva-Slavonia Route and D10 Adriatic Islands Route (Fig.1.) (Cycling Tourism, 2020). 114 cycling events have been organised on the local, regional, and national levels from September 2019 until October 2020 (Cycling Tourism, 2020). A number of cycling events that were supposed to take place from March 2020 were postponed due to the COVID-19 pandemic. Thus, one of the most famous bicycle races, the race through Croatia "CRO Race" did not take place.

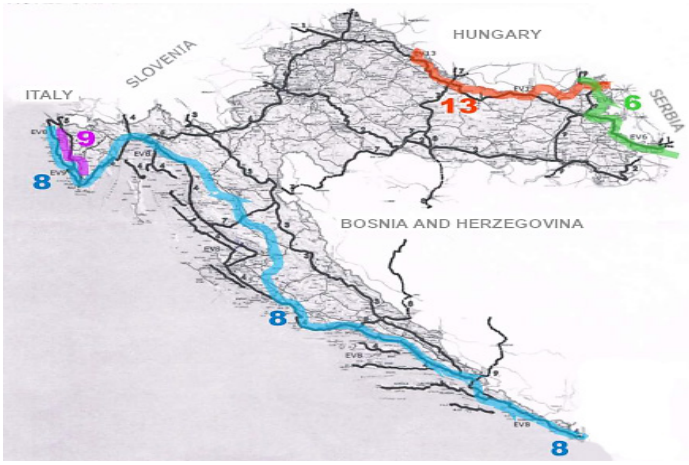

Fig. 1.
Corridors of the Main National Cycle Routes (in Black) and EuroVelo Routes (Marked with Numbers)
Source: edited in accordance with (Klarić et al., 2015)

According to the research conducted in 2014 and published in 2015 that covered 206 persons, the Croatian cycle tourist has the following characteristics: men are the dominant group (83% of respondents), the average age of male and female cyclists is between 31 and 40 (45% of respondents), 55.28% of respondents have a secondary school degree, while 42.21% of respondents have a university degree, 88.44% cycle on a daily basis, 41.71% cycle three to five times per week, 50.75% have been actively cycling for more than five years, 99.5% of respondents own a bicycle, while 72.22% own a more expensive bicycle, such as a mountain bike (MTB), good purchasing power (40% of respondents are willing to spend more than 1,300 euros on cycling activities and services during their vacation), 77.67% of respondents have a stay extending beyond 5 days, 48% of respondents always, and 31% of respondents sometimes use their own bicycle while on vacation, for 35.70% of respondents, cycling services and contents are always an important determinant for the choice of destination, while for 33.1% of respondents, it is never important, accessibility of a tourist landmark by bike is important to 72% of respondents,

while a supply of special facilities for cyclists is important to 55% of respondents, organised bicycle races and tours are important to 52%, 81% of respondents view the availability of information as a key determinant of success and attractiveness of a cycling destination, the accommodation choice criteria are a basic service at the destination of the stay for 48.74% respondents, while the accommodation price is important to 43.22% of respondents. They also favour a specialized cyclist hotel and an offer of contents and services such as indoor and outdoor bicycle parking space, bicycle service, cycling clothes wash, rent-a-bike service, short-distance transfer and professional guide service (88% of respondents) (Kovačić, 2015). Table 1 displays the cycling practice of the Croatian cycle tourist in relation to the social component.

Table 1

Type of Bicycle use at the Destination in Relation to the Social Component

	Cycle Alone	Cycle in a Group	Organised Cycling	Combination
Travel by bicycle	25.00%	12.5%	12.5%	50.00%
Always use their own bicycle when on vacation	22.11%	33.68%	0%	44.21%
Sometimes use their own bicycle when on vacation	24.59%	37.70%	0%	37.70%
Rent a bicycle	7.69%	53.85%	15.38%	23.08%

Source: (Kovačić, 2015)

The research of the attitudes and consumption of tourists in Croatia conducted from May 2019 until March 2020 has shown that the motives for visiting Croatia are sports and recreation for 19.5% of guests (Marušić *et al.,* 2019). 5% of tourists stated cycling as an activity during their stay in Croatia, while 67% of tourists said they had a medium degree of satisfaction with the offer of cycle paths and routes at their tourist destination. The results of the research on cycling as an activity, satisfaction with the offer of cycle paths at the tourist destination and satisfaction with the offer of cycle paths at the tourist destination in relation to the type of accommodation are displayed in Tables 2 and 3 (Marušić *et al.,* 2017).

Table 2

Results of the Research on Cycling as an Activity and the Offer of Cycle Paths

	Persons aged under 29	Persons aged 30 to 49	Persons aged 50 and above
Cycling activity during a stay at the tourist destination according to tourist age	9.5%	13%	14.0%
Degree of satisfaction with the offer of cycle paths at the tourist destinations	Low	Low	Medium

Source: (Marušić et al., 2017)

Table 3

Results of the Research on the Types of Accommodation and the Offer of Cycle Paths

	Hotels	Camps	Private Accommodation
Cycling activity during a stay at the tourist destination according to tourist accommodation type	7.6%	23.8%	9.7%
Degree of satisfaction with the offer of cycle paths at the tourist destination according to tourist accommodation type	Low	Low	Low

Source: (Marušić et al., 2017)

According to the research of the tourist attitudes and spending in Croatia from May 2019 until March 2020, the share of tourists who cycle on designated cycle paths during their stay at the tourist destination by country of origin is: Croatia 7%, Germany 5.9%, Slovenia 8.8%, Austria 4,6%, Poland 6.4%, Italy 3.7%, Czech Republic 0.2%, United Kingdom 2%, Hungary 2.6%, four Scandinavian countries 4%, the Netherlands 3%, Slovakia 5%, France 4.8%, Bosnia and Herzegovina 4.6%, USA 1.4%, Switzerland 5.5%, Belgium 4.9%, Serbia 5.4%, China 0% and South Korea 0.2% (Marušić *et al.,* 2019). Degree of tourist satisfaction with the offer of designated cycle paths (as an element of the tourist offer of the destination) by country of origin is: Croatia (low), Germany (high), Slovenia (medium), Austria (high), Poland (high), Italy (medium), Czech Republic (medium), United Kingdom (high), Hungary (medium), four Scandinavian countries (medium), the Netherlands (high), Slovakia (medium), France (low), Bosnia and Herzegovina (very low), USA (medium), Switzerland (medium), Belgium (medium), Serbia (medium), China (very low) and South Korea (very low) (Marušić *et al.,* 2019).

3. Analysis of Cycling Tourism in the Four Different Geographical Regions of the Republic of Croatia

In order to obtain insight in the degree of development of cycling tourism in specific regions of Croatia, the cycling routes/paths and the number of accommodation establishments need to be researched as the starting point for the development of cycling tourism. In this study, we have performed an analysis of cycling tourism in Croatia. Four counties situated at various geographical positions have been included in the analysis, in order to cover different geographical regions in the country. Thus, the analysis covered the Sibenik-Knin County that is situated in the southern part of Croatia (central part of Dalmatia), Medjimurje County that is in the north of Croatia, Osijek-Baranja County in the eastern part and Istria County in the west of the country. All of the analysed counties have different cultural and natural tourist landmarks, and each of the counties has good road connections via the motorway and national roads. The Pan-European cycle route EuroVelo also passes through all of the analysed counties.

The Sibenik-Knin County has an area of 5,670 square kilometres, out of which 2,994 square kilometres are mainland area. There are 5 cities and 15 municipalities in the county. According to the 2011 Census, there are 109,375 inhabitants in the county (Sibenik-Knin County, 2020). From the geographical point of view, the county is divided in two parts, out of which one is the maritime (coastal) part with the Adriatic coast, and the other is the continental (mainland) part, with Dalmatinska Zagora. Tourism in the county exists in the coastal and narrow inshore area, while it is quite weak in the hinterland of the county. According to the Croatian Bureau of Statistics, in 2019, the county was visited by 1,009,451 tourists (Croatian Bureau of Statistics, 2020). There are 103 cycle routes (paths) in the territory of this county, in the total length of 2,565 kilometres. There are 70 establishments for the accommodation of cycle tourists in the territory of the county and 20 cyclist manifestations have been held (Dalmatia Sibenik Bike, 2020).

Istria County has the area of 2,813 square kilometres and, according to the 2011 Census, 208,055 inhabitants. There are 10 cities and 31 municipalities in the county (Istria County, 2020). The Istria County is the most frequented tourist region in Croatia which, in 2019, was visited by 4,481,698 tourists (Croatian Bureau of Statistics, 2020). The total length of cycle paths in the Istria County is 4,869.35 kilometres, the county has 147 cycle paths, 44 cycling manifestations were held, while the number of accommodation establishments for cyclists (cycle tourists) with the Istra Bike & Bed certificate are 139 (Istria Bike, 2020).

Medjimurje County, with 729.5 square kilometres, has the smallest area in comparison with the other analysed counties. According to the 2011 Census, it has 113,804 inhabitants (Croatian Bureau of Statistics, 2020). There are 3 cities and 22 municipalities in the territory of the county (Medjimurje County, 2020). According to data from the Croatian Bureau of Statistics, in 2019, the county was visited by 81,924 tourists (Croatian Bureau of Statistics, 2020). According to data from the Medjimurje County Tourist Board, the total length of all cycle paths in Medjimurje is 854.34 kilometres, the number of accommodation establishments for cycle tourists (with the CyclistWelcome designation) is 25, there are 11 cycle paths in the county and 18 cyclist manifestations have taken place (Medjimurje Bike, 2020).

The Osijek-Baranja County has an area of 4,155 square kilometres and, according to the 2011 Census, 305,032 inhabitants, while there are 7 cities and 35 municipalities in the county (Croatian Bureau of Statistics, 2020; Osijek-Baranja County, 2020). According to data from the Croatian Bureau of Statistics, in 2019, the Osijek-Baranja county was visited by 107,598 tourists (Croatian Bureau of Statistics, 2020). According to the data by the Osijek-Baranja County Tourist Board, four cyclist manifestations have taken place in the county, the total length of cycle routes is 323.5 kilometres, the number of accommodation establishments for cycle tourists is 7 and the number of cycle routes is 3 (Cycle Paths, 2020).

Figure 2, 3 and 4 display the results of the analysed length of routes/paths and number of accommodation establishments in four geographically different regions of Croatia.

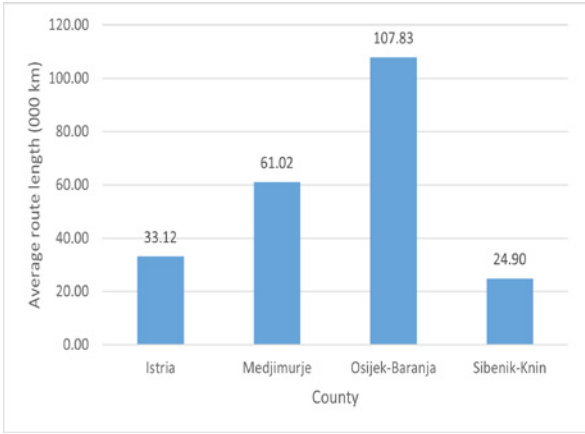

Fig. 2.
Average Route Length in the Observed Four Counties
Source: edited in accordance with (Istria Bike, 2020; Medjimurje Bike, 2020, Cycle Paths, 2020; Dalmatia Sibenik Bike 2020)

Osijek-Baranja County has the longest routes, which are, on average, by 82.93 kilometres longer in comparison with the shortest cycle routes established in the Sibenik-Knin County (Fig. 2). The weighted average route length is 32.26 kilometres for all of the observed counties together.

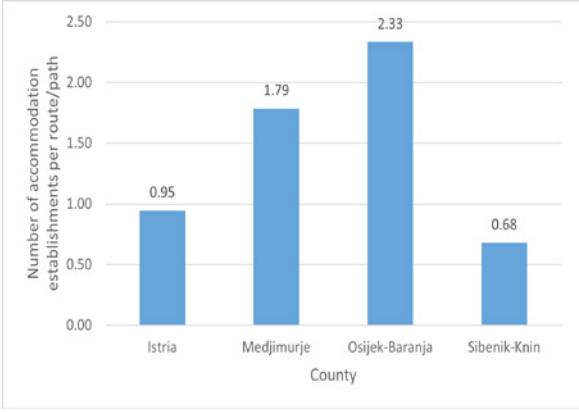

Fig. 3.
Presentation of the Number of Accommodation Establishments per Route/path in the Four Observed Counties
Source: edited in accordance with (Istria Bike, 2020; Medjimurje Bike, 2020; Cycle Paths, 2020; Dalmatia Sibenik Bike 2020)

The largest presence of accommodation establishments was established on the cycle routes/paths of the Osijek/Baranja County, while the smallest presence of accommodation establishments was observed on the cycle routes/paths of the Sibenik-Knin County (Fig. 3). The weighted average number of accommodation establishments per route/path is 0.90 establishments, which means that, on average, there is less than one establishment per path/route.

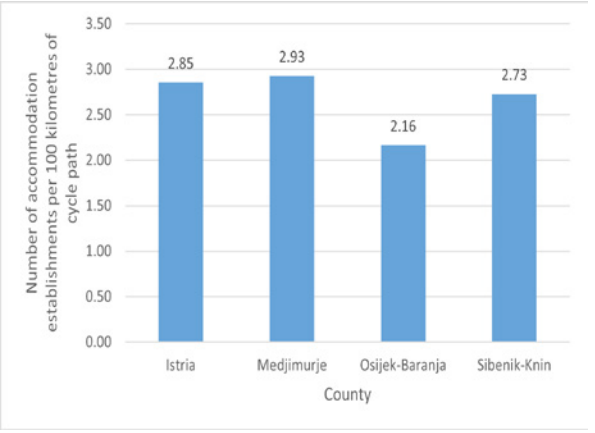

Fig. 4.
Number of Accommodation Establishments per 100 km of Route/path
Source: edited in accordance with (Istria Bike, 2020; Medjimurje Bike, 2020; Cycle Paths, 2020; Dalmatia Sibenik Bike 2020)

By using the indicators of the presence of accommodation establishments in relation to path length (Fig. 4.), it can be established that the largest number of establishments per 100 kilometres of cycle path is present in the Medjimurje County, while the Osijek-Baranja County has the lowest number of accommodation establishments per 100 kilometres of cycle path. The weighted average number of accommodation establishments per 100 kilometres of cycle path is 2.80 establishments, i.e. on average, there is one accommodation establishment per 35.71 kilometres.

4. Conclusion

Cycling is a sustainable form of transport that has a positive impact on health and the environment through the reduction in CO_2 emissions, air pollution, noise pollution and fuel consumption. Cycling tourism is a relatively new form of tourism that contributes to sustainable tourism development. There are different definitions of cycling tourism, but they all involve traveling by bicycle along a route for various reasons, such as exploration of a tourist destination, athletic activity, physical and

mental health, entertainment, being closer to nature. Cycling tours are becoming increasingly popular in Europe, while cycling tourism keeps gaining significance for tourism revenues. This type of tourism is ideal for the development of rural and outlying areas. Research of cycling tourism in the Republic of Croatia has shown that there is a low level of satisfaction in relation to the offer of cycle paths/routes and a low share of guests (5%) that use cycling as an activity during their stay. Even though Croatia has more than 15,000 kilometres of cycle routes and several EuroVelo routes pass through the country, while it also prides itself with a good climate, natural beauty and various tourist attractions, this is obviously insufficient for the development of cycling tourism, a fact that was confirmed by the analysis of paths/routes and accommodation establishments in the four observed counties (Sibenik-Knin, Osijek-Baranja, Medjimurje and Istria). Taking into account all four analysed counties, the analysis has shown that the weighted average number of accommodation establishments per route/path is 0.90 establishments, which means that, on average, there is less than one establishment per path/route. Furthermore, it has also shown that the weighted average number of accommodation establishments per 100 kilometres of cycle path is 2.80 establishments, i.e. there is, on average, one accommodation establishment per 35.71 kilometres, while the weighted average route length is 32.26 kilometres for all the observed counties together. It can therefore be concluded that Croatia needs to invest in the development of its cycling tourism in relation to the length of routes/paths, as well as the number of accommodation and other service establishments intended for cycle tourists.

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