THE LOGISTIC PRODUCT OF BICYCLE DESTINATIONS

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Abstract
Purpose – of the study is to indicate the path of much needed segmentation in the Croatian tourist supply. Therefore, it aims to identify the destination-specific elements of bicycle destinations in Europe, within the context of cycle tourism demand.
Design – While the quality of the tourist product is proportional to the level of logistics implementation and the rivalry on the tourist market is supply chain-based, the focus is on a crucial element of tourist supply chain management—information.
Methodology – The study recognizes both counterparts on the market, although highlighting the tourist supply. The data on supply was collected by researching the internet information sources available to cycle tourists while making travel decisions. Findings on the destinations' logistic product variables are compared to criteria set by the researched cycle tourism demand.
Approach – This small-scale research of bicycle tourism supply aims at testing the selected criteria for the purpose of a sequential wider research oriented towards providing a list of possible upgrades for Croatian destinations.
Findings – Among all features attributable to a destination, research demonstrated that the cycle tourists' primary focus is on information accessibility. The cycling-specific supply recognizes this information dependency and targets the market by a variety of needed information, while general tourist sites often lack complete information.
Value – Similar research of bicycle tourism does not exist. The field is mainly contributed to trough conceptual discussions and studies of existing practice. This research establishes to what extent the demand and supply side match by identifying the common attributes of cycle tourism destinations.
Keywords bicycle tourism destination, tourism supply chain management, logistic information flows, cycle tourism demand, cycling-specific supply

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INTRODUCTION

Creating a tourism product is a logistic process. Logistic processes play an important role in designing the tourist destination's offer. The basis of each logistic product is information. Authenticity and uniqueness of the destination product have to be communicated to special interest tourists (here – cycle tourists) by targeting the segment which develops and designs the supply. In a time of exeptionally dynamic technologically advanced information and communication technology it seems impossible that a destination cannot reach the target market with information about

their offer. Nevertheless, it can be noticed that destinations do not use the available possibilities, do not use them in an appropriate way (insufficient quality of published information – too much, too little, insufficiently precise), or do not segment their offer (the offer for cycle tourists is only one segment which is often lost in a mass of general information; it is an insufficiently well-developed product and is not interesting to cyclists).

MANAGING THE DESTINATION'S SUPPLY CHAIN: MANAGING INFORMATION

The tourism supply chain implies managing the network (Christopher 2011) of stakeholders participating in the creation of a tourist product in its complexity, made of different services and tailored towards the perception of the targeted market. Logistic flows of goods, services, money, knowledge, energy, raw materials and semi-products travel between the partners in the supply network (that are for the purpose of this paper considered as stakeholders of the destination supply and the logistic system of supply management and organization. The entire resource basis, created by these logistic flows in the process of creating a tourism product, represent an investment that is impossible to evaluate without considering its connection to the final user/target market.

The logistics of a tourism destination implies the optimization of the variety of logistic flows within the destination, in certain conditions. It implies the optimization on a macro and micro level (Mrnjavac 2012), but nevertheless it is a system of several subsystems, its size dependant on conceptualizing the notion of a tourist destination and the variety of supply in the area. The focus of this paper is on the macro logistic system of a tourism destination supply.

One could adopt the tourism logistics perspective according to Mrnjavac (ibid.) by considering the activities and processes of the destination's logistic system. By doing so it could be argued that tourist destination management relies on the hospitality, intermediary, transportation and attraction logistics subsystem optimization. Obviously, apart from other logistic flows that prevail in a single subsystem, information is equally important in all of the identified.

To ensure the quality and the value attributed to the product by the tourist, destinations need a well integrated network of processes. Coordination is only possible if destination management recognizes the need for optimizing all logistic flows that run through the supply network.

The processes and operations of the supply chain in general include the sales, marketing, acquisition, development and transport (Drzymalski 2012, 39) and if it is an intangible product, i.e. when the product is the result of providing services, then these processes are transformed. The destination's product is controlled by destination management by employing the possibilities of logistic management to control seasonally oscillating logistic flows. Planning the tourism offer of a destination is based on information generated by the demand, both in terms of planning a destination product (overall and in terms of individual segments), and in terms of incoming factors

ensured by individual stakeholders in the process of creating a destination product. The quality and quantity of the destination product (which is placed on the market at the appropriate time and under appropriate conditions) depends on the timely and sufficient exchange of information between stakeholders in the supply chain. Logistic flows of information are the object of the Logistics Information System (LIS). The objectives of LIS recognize the role of internal and external communication of a certain system inside the supply chain network. LIS is required to carry out business processes and to manage them (Galičić and Pilepić 2012, 102) optimally.

When creating any tourism product, information flows constitute a key component of managing the logistic process and transport is the key facilitator of movement of all material flows in the process, which can be concluded by taking into account the determinants of the logistic process identified by Page (1999, 185, Figure 6.2). Designing and creating services for the target market segment is more demanding than using a non-segmented market approach that targets the masses.

Taking into account the phase in the exchange process between representatives of the tourism supply and demand, the tourism product is perceived as an intangible idea or a "tangible" experience. It is obvious that the communication between the tourism supply and demand takes place before, during and after the tourist's stay in the destination and their purchase of the tourism product. It is possible to identify the following five phases:

1) gathering information about the target market (supply);
2) communicating the offer and the terms of its use (supply);
3) exchanging information on the possibilities of meeting the needs of special interest groups of tourists (supply and demand);
4) distributing information important for the destination product (supply) and using available information connected to the tourists' stay in the destination (demand) – making use of purchased services or buying services on site;
5) investigating the tourists' satisfaction after their stay in the destination (supply)/ complaints about the provided services (demand).

When the exchange of information takes place online it is extremely important that it has been adapted to the needs of the target market, that it is complete, up-to-date and clear. The abovementioned categorization does not indicate steps in the communication process but rather different types of communication. When all these components of information management have been employed, it is clear that LIS will function at an optimum level. It can be logically concluded that the success of managing information at the level of the destination's tourism product (put into action by logistic management) is made apparent through their availability to potential users and the existing loyal customer basis.

Researching tourism product differentiation strategies in achieving competitiveness, Curtis, Mylonakis and Ktenidis (2007) confirm that the use of ICT helps decrease seasonality and achieve better connections among stakeholders of the destination supply (GPS stands out as a destination product feature when focusing on the cycling tourist demand).

CYCLING TOURISM AND THE DESTINATION

Bicycle or cycling tourism refers to „travel between places by bicycle for leisure purposes, and where the act of cycling is an integral part of the tourist experience“ (Millington 2013). Sustrans (1999) defined it as “recreational visits, either overnight or day visits away from home, which involve leisure cycling as a fundamental and significant part of the visit.” Addressing many of the definitions (Simonsen, Jorgensen i Robbins 1998; Ritchie 1998; Sustrans 1999; Lumsdon 2000; Lamont 2009; Marcussen 2009; and other) one is able to argue that it is not so much the width of the definition that could be an issue, rather it is a set of criteria that would enable unified (and comparable) statistical data for the purpose of determining the value and the size of the cycling tourist market.

Europe is well-established as a cycling tourism destination, and Croatia’s natural features make it a challenging and interesting destination for the cycling tourist, if only the market was (properly) addressed. There are no accurate statistics on cycling tourism at a European level. Drawing upon verifiable data, even the European Parliament (2009) forms an assumption when stating that European cycle tourism generates 44 billion euros in tourism consumption, while arguing the market is significant and growing. With a total number of domestic and international overnight holidays estimated to be over one billion in 2011 (Millington 2013), bicycle tourism accounts for almost 2% of total overnight tourism trips in Europe. Germany is Europe’s leading cycle tourism destination with 27% of the tourist market (ibid.).

Even if tourists do not use the bicycle to travel to the destination, cycling tourists use bicycle to get around the destination and to engage in various activities throughout their stay. The influence of cycling tourism on the destination needs to be researched in correlation with the tourist activitiy during their holiday, which includes the use of accommodation facilities, transport between their place of residence and the destination and various tourist activities in the destination.

The benefits that the destination can profit from by developing cycling tourism can be identified with regard to the following aspects: (1) equal or greater tourism expenditure by cycling tourists compared to other tourist groups; (2) generating the demand (and developing the supply) for specific products and services in the destination; (3) using the services of local providers and increasing the financial influx to the local economy[1]; (4) minimum ecological impact on the destination of this type of transport and reducing traffic flows; (5) using or repurposing existing and insufficiently used, run-down or outdated infrastructure; (6) improving the destination image and attracting new or different visitors: (7) increasing the activity of the local residents and other benefits for the community that come from a more active lifestyle, among other things (Sustrans 1999, 3).

[1] Compared to visitors arriving by car (7.3£), cyclist expenditure on food and services in the destination is higher (25£) (ECF 2013).

Although the traffic and tourism offer is on a lower tier than the destination product, the elements and activities, the structure, functions and behaviour of the traffic system indicate that this is the foundation for creating a destination for cycling tourists, i.e. a system that is able to independently participate in the tourism offer of the target market. The integrated subsystem of cycling traffic generates a positive effect on all forms of demand (local residents, visitors, supply), but a lack of traffic infrastructure does not necessarily imply a lack of cycling culture in the area and thus an inability to develop the cycling tourism offer, as suggested by Chang and Chang (2003, 1983).

Previous research indicates a hierarchy (Krieger 2007 cited in Marcussen 2009, 14) and a chronologic development (Chang and Chang 2003) of cycling destinations depending on the previous state in the destination, i.e. depending on the size and sources of the traffic demand. Most research into cycling tourism lists characteristics of infrastructure (Simonsen, Jorgensen and Robbins 1998; Dufour 2010; etc.) as crucial for cycling destinations, followed by information about the infrastructure (route planning tools, track GPS, online and interactive cycling maps etc.).

CYCLING DESTINATION: THE RELATIONSHIP BETWEEN TRANSPORT AND TOURISM OFFER FOR CYCLISTS

Mrnjavac (2001) points out tourist destinations require specific organization of traffic, which will also make the tourist facilities available in a particular time and contribute to the development of tourism in the long term. Due to the seasonality of tourism trends, it is important that cycling infrastructure meets the requirements of also the functional users, reducing the fluctuations in the network use. Alternative forms of mobility imply adapting destination traffic and tourism sub-systems. Tourist Demand Management includes a range of strategies aimed at improving transport opportunities, integration of alternative modes of transportation in tourist activities, discouraging driving car and promote alternative modes of transport (Litman 2003, 26).

Once abandoned as a technologically subordinate to cars, bicycles re-affirmed as a means of transport because of their minimal impact on the environment and benefits for the community. Using a variety of means, cities are trying to transform the NMV (non-motorized vehicle) or NMT (non-motorized transport) environment, aware of the need for long-term sustainability of transport systems.

The bicycle as a means of transport survives if the traffic policy integrative and holistic (de Jong and Rouwette 2009, 2) and addresses a multi-modal transportation system. Speed of movement, flexibility and the ability to determine the exact time traveling support substitution of a passenger car riding over short distances (up to 5 km), which advocates and Lamont (2009), while for longer distances possible bicycle combined with public transport. This opens up many possibilities for Croatian destinations faced with the problem of insufficient capacity of the transport system and reducing bandwidth usage at the time the largest concentration of tourist flows to the destination.

To make cycling infrastructure networks an option for travel it is necessary to: (1) use existing resources (infrastructure that is not being used), (2) reduce the consumption of limited resources and waste through substitution of means of transportation by bicycle or by combining with public transport where possible, (3) make integration with other subsystems in the planning stages of development partnerships and networks, (4) maximize the economic impact at the local level and involve local people in planning and implementation, (5) to promote diversity and authenticity, (6) respect the periodicity of development phase, and (7) to monitor and manage the process (Lumsdon 2000, 369), all for the purpose of creating a Tourism Transportation Model destinations.

Models existing in European destinations indicate different development opportunities for cycling destinations, according to the differences in the specific characteristics of destinations' location, stage of development, the support of the community and the differences in mentality. These influences determine the differences in the approach to the development of bicycle traffic, as well as tourism. Godefrooij, de Jong and Rouwette (2009, 31) suggest guidelines that could be relected to creating a transport policy of a successful destination:

- acceptance, as opposed to the imposition,
- adaptation, as opposed to copying,
- flexibility proposal or more options, as opposed to one predefined proposals,
- egzogamy, unlike endogamy (ability to transfer good practice from different cultures),
- starting informally, as opposed to formal procedures,
- fostering a sense of the necessity of change.

Pardo and Sagaris (2009) identify the optimal economic and environmentally sustainable transportation system of urban areas as a combination of walking short distances, cycling the medium ones, and public transport over the long distances. Integration of bicycle traffic in the destination system is generates further positive effects (DB Rent 2008, 46).

MARKET DEMAND OF CYCLING TOURISM: THE CASE OF CROATIA

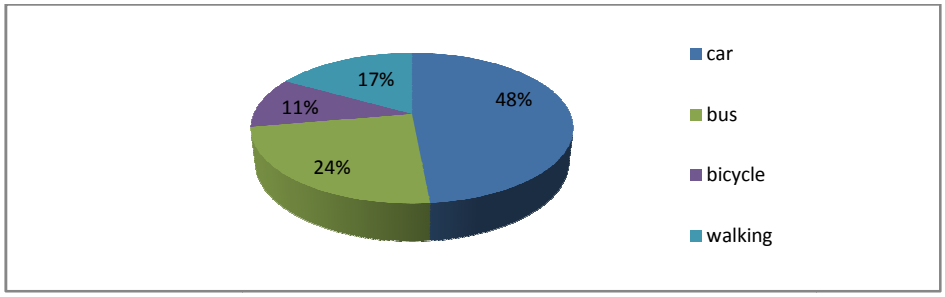
Mrnjavac and Kovačić (2012) prove the importance of infrastructure on the one hand and promotion on the other when a destination for cycling tourists is offered, which depends on the stage of development of the destination in the context of the cycling offer.

Trendscope (2008) (cited in the European Parliament in 2009, 30) points out some preferences of cycling tourists - safety (associated with low density of traffic), ease of use (marking of trails), the variety of trails on offer and accommodation facilities, food service facilities near or along the trail. Aforementioned is considered to have a more significant influence on behavior than the availability of information materials, public transport, wide extent of cycling network (density), maintenance service of means of transport (bicycle service) and the infrastructure facilities at rest and service areas.

Research on the potential demand in Croatia has been performed on two occasions. The research in 2013 was focused more generally - on the traffic behavior of a hundred randomly selected respondents, spatially dispersed throughout the territory of the Republic of Croatia. A questionnaire distributed by instructed interviewers was used in order to perform the research. The aim of this research was to determine the role (share and purpose) of the bicycle as a means of transport in the behavior in traffic and to put (analyse) its role in relation to the environmental characteristics of Croatian destinations. Although the sample is limited, the results are indicative. For the purpose of this study certain segments of the research has been left out.

The bicycle is a primary means of transport for 11% of respondents (the EU average is 12%) - figure 1, whereby 66% of the respondents uses it to perform regular periodic activities and occasional tasks. Unlike 18% of respondents who do not use the bicycle, the rest of the respondents are mostly using the bicycle several times a week (57%), while for 8% of the respondents its use is a part of everyday activities.

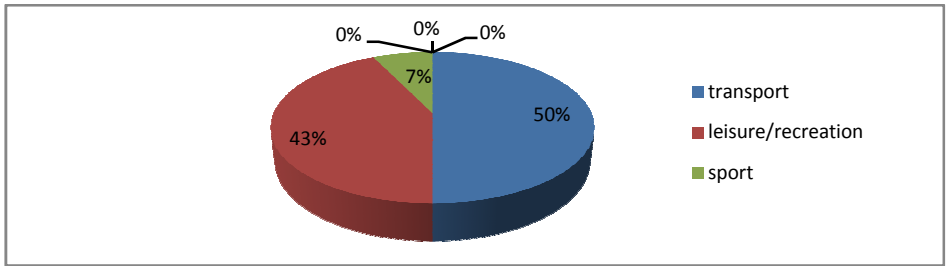
Figure 1: **Primary choice of a means of transport in Croatia**



Source: author contribution

Cycling on the level of the whole sample is perceived as a recreational and social activity (97%) which is mainly carried out on areas for pedestrians or traffic flows (totally 53%). For individuals whose first choice is a bicycle, it has both the function of a means of transport (for 50%) and recreation (43%) and sports (7%) – figure 2.

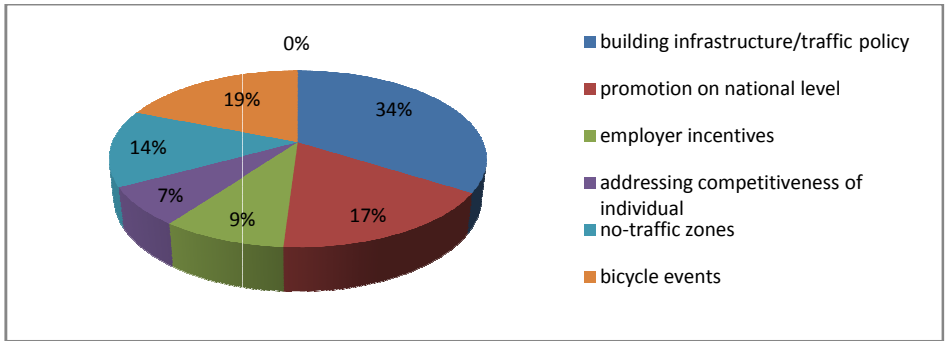
Figure 2: **The function of a bicycle in everyday life**



Source: author contribution

When proposing incentives for the development of the bicycle traffic in destinations, a third of respondents considered the infrastructural solutions and measures of the traffic policy as crucial (34%), while one fifth of the respondents considered the cycling events as crucial (19%) - figure 3, which applies to the whole sample. The respondents also listed general promotion campaigns on national level (17%) and implementing "no-traffic" zones (14%) as more important incentives.

Figure 3: **Cycling development incentives in destination**

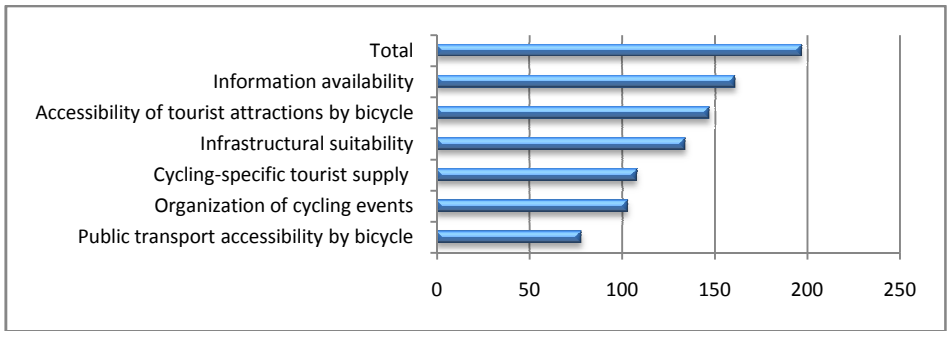


Source: author contribution

In destinations where respondents confirmed the existence of the infrastructure, research indicates that the major part in the offer consists of the trails surrounding the city (39%), outdoor car parking (27%) and trails in the city (20%).

An extensive research of a narrower focus regarding the characteristics of the potential demand of cycling tourism in Croatia was performed in 2014 through the distribution of online questionnaires to a closed group of two hundred respondents according to the criterion of practicing cycling in the form of sports and recreation. A question with a possible multiple response indicates the perception of determinants typical for the offer of a cycling destination. The results are shown in the figure 4.

Figure 4: **Elements of a cycling tourism destination (potential tourist perception)**



Source: author contribution

Results prove that the determinants of the "cycling" destination are actually the features of a tourist destination, which is tailored to the needs of cyclists by offering them additional facilities and services. For the researched sample of cycling tourism demand, the most important feature of a cycling tourism destination is "information availability (maps, GPS downloads, real-time information)" (83% of respondents). The following features listed one after another are: “accessibility of tourist attractions by bicycle” (76%), “infrastructural suitability (network of bike paths, safe bike parking at attraction sites or catering facilities etc.)” (69%), “cycling-specific tourist supply (e.g. tourist guides on bikes)” (56%), “organization of cycling events” (53%) and “public transport accessibility by bicycle (especially transport of bicycles)” (40%).

RESEARCH ON THE INFORMATION AVAILABILITY IN THE DESTINATION (OFFER) FOR CYCLING TOURISTS

On the path of the elaborated connection of cycling transport, cycling tourism and informational precondition in supply network management (primarily information management) directed to the adequate offer for cycling tourists, the offer of existing mountain-biking destinations was investigated according to the information availability to tourists - with a focus on six points that were previously identified as determinants of a tourism product in a cycling destination.

The research involved 28 destinations in the form of inhabited settlements defined by administrative boundaries, i.e. five Austrian and two Swiss and two Italian regions where it is possible to identify the existing offer for mountain bikers. A total of 38 websites were investigated. The criterion for determining a cycling destination is the existence of a bike hotel (min 1), since they are independent in providing services for cyclists but their offer presupposes an adequate offer in the destination. Taken in consideration were the sites generated by well-known and selected service providers and tourist organizations in the field. The results are discussed in the following text.

Related to the number of destinations tourist offer is better represented in online form in Austria and Switzerland (about 1.4 web sites per destination) than in Italy (1.1). The availability of information for cycling tourists in the destination on the level of the analyzed country is minimum 1 (Switzerland) and maximum 6 (Austria) of clearly defined cycling-specific web sites, each accompanied by a profile on at least one social network. When the data are is put in relation with the number of investigated websites, representation of cycling facilities is higher than 55% in Italy, 30% in Austria, and slightly lower than 17% in Switzerland.

Information about cycling in the environment has been found in all the investigated data sources, but they differ in the range and quality of information provided. Information on cycling infrastructure is available on all Internet tourist web pages of destinations, but also on the websites of the respective service providers for cycling tourists (e.g. of a bike hotel), information about the classic tourist services, too.

On the websites with a general tourist orientation the offer for cycling tourists is primarily presented in the section "summer" (41% of the pages) and "activities" (27% of the pages) followed by "biking (& hiking)", "what would you like to do? / things to do "," sports / leisure time "and" holiday types. "Although online information of each of the observed countries is presented in a range from briefly stating that possibility for cycling exists and perhaps a link to the another page to a clearly and fully elaborated offer, if the range of information offered for cycling tourists is considered, the most comprehensive sites are the ones of the Italian tourist destinations (an average of 8 menu items) followed by Swiss (7.4) and Austrian sites (4.5 items). On these pages the most common pieces of information provided are usually information on tours / trails / routes, accommodation, packages, bike shops/rental, e-bikes, events, guides, bike transport and bike area.

On the websites dedicated to cycling and cycling tourists the information on routes / trails and tours, accommodation, regional and bike parks/centers and packages prevail, some even considering tips for safe cycling in the region, real time weather forecast and other more detailed useful information for a tourist travelling by bike. Pieces of information on the infrastructure (sections named routes / trails / paths / maps) are the most important ones for cyclists and typically exhaustive. They consist of the basic technical characteristics of the infrastructure, roadmaps, altimetry and interesting features of each individual track. In addition to the aforementioned the GPS download is available to tourists for 134 trails in Italy (a 100%), 63 in Switzerland (90%) and 55 in Austria (89%).

Also, information related to the accustomed cycling tourist offer is available on the same sites and they enable the identification of offered self-guided tours, bike centers, bike guides and bike programs, and each of these offered items disposes with its own web site providing the offer elaborated in detail according to demand segments. In the tourist offer accustomed to cycling tourists a prominent place is taken by bike hotels and pieces of information about them that are available through the own web sites – web sites of association of bike hotels, regional tourism offices and regional portals dedicated to cycling. The information is detailed to the point of showing the basic offer in accordance with a specific aspect of the categorization of the target segment (internal categorization of hotel association), offer on additional services for cyclists and their escorts at the hotel and the destination. In relation to the geographic distribution (number of regions in analyzed country), most bike hotels are found in two Italian regions (9 on average), although if the absolute number is considered, Austria is a leading country with a total of 36 hotels. It is evident from the data presented in the table that Tirol is Europe's most important region by specialized hotel offer for cycling tourists, primarily mountain bikers.

Table 1: **General research information**

Country	No. web sites researched	Cycling-specific web sites	Total no. hotels	Studied regions no.	Highest regional concentration of bike hotels
Austria	22	6	36	5	15 (Tyrol)
Italia	9	4	18	2	13 (South Tirol)
Switzerland	7	1	8	2	5 (Graubünden)

Source: author contribution

Cycling destinations are accustomed to visiting the attractions by bike, but according to the available information, it should be noted that the classic tourist offer is not rich in terms of cultural and historical heritage, but it relies on the attractiveness of the natural environment (in some destinations cycling activity is permitted within the protected natural facilities as for example protected natural areas).

Information on cycling events indicates that any of the investigated regions hosted at least one big or important international cycling event, and in most cases it is about two or three. Each of the recorded examples is included in the offer of the destination (through the interconnectivity of the data base), but there have also been found out the examples of self-promotion supported by their own marketing activities and information distribution through the web pages presenting the event itself or the web pages provided by the event organizer.

Transportation of bicycles by the means of public transport is to the lowest extent used in the investigated sources and a general impression is that it is a neglected aspect of the offer. Available information sources, namely, provide the information on how to reach a destination by various means of transport, but they do not give the information on the possibility of integrated bicycle transportation and means of the public transport. However, the research has pointed out the exceptions that apply to the travelling through the destination whereby in some cases the tourists are directed to use complete mobility chains in the area.

CONCLUSION

The bicycle offer is well-communicated throughout the cycling tourism market whereby cycling-specific web sites offer a variety of information needed before trip (when making a decision), during the trip (information on all relevant aspects of activity involvement safe and with quality guarantee) and even after (videos online, holiday evaluation etc.). One could argue the optimal information flows towards the tourist if a couple of sites that offer information only in their native language are considered.

Due to their character (focus on all relevant aspects of supply) regional tourism web sites could be perceived in a range of poor (only listing cycling as a possibility and not managing information) to excellent (providing all relevant information for cycling tourists, offering links to broaden the scope of information if required).

From the above identified demand expectations of a bicycle destination a conclusion with the following remarkable features could be derived:

- Information availability is good (online), while most regions distribute cycling-related information through minimum of two web-sites in all three analysed countries;
- Accessibility of tourist attractions by bicycle is not separately addressed and the lack of information on the topic shows that this is an area of suboptimal supply communication (supply chain suboptimal management);

- Nevertheless, the accessibility of attractions by bicycle is to great extent an issue of infrastructure. Since the focus is on mountain-bike destinations, infrastructural suitability implies natural setting for riding and mostly natural attractions. Thus, established optimal level of information availability on infrastructural component of destination supply leaves no room for improvement on cycling-specific sites, while regional tourism sites vary greatly in information on infrastructure (on the issues most important during the decision making for a cycle tourist).
- All the researched sites information about cycling-specific tourist supply is basically formed around the accommodation facilities in the area (mostly bike-hotels), in some cases even the criteria of cycling suitability of accommodation is public. Research established a limited amount of information on thematic routes, bike-sharing, programmes for families and concepts such as "happy bike". Aside accommodation, information on cycling-specific supply is mainly oriented towards the events.
- Cycling events are well communicated to public, although better on cycling-specific sites. All sites list the major and significant events but some also offer information on recreation and amateur competition on a smaller scale.
- Studied sites offered no information on public transport integration with bicycle traffic, and the possibility of transferring the bicycle during the stay in the destination was addressed in only one case, enabling information on the options for hiring taxi services.

Since all of the studied items are the components of the bicycle destination tourist supply, one could suggest upgrading the information availability on cycling-specific supply and public transport integration with cycling. All these six components are of key significance for the optimal supply chain and perceived quality of a supply-sensitive cycling tourism market.

RESEARCH LIMITATIONS

The study focused on information available to bicycle tourists online. This in itself is not considered a limitation. The research approach determined it as rather limited in extent and the sample chosen deliberately provided indicative conclusions. Future widening of the research scope to more bicycle destination implies developing a straight forward crtieria, while future research value lies in tangible suggestions on destination performance. Except this limitations to given conclusions, researching cycling-specific offer should also focus destinations in different state of development, not only well known bicycle destinations.

The focus on the logistic aspect of bicycle destinations is perceived trough information availability. Numerous logistic flows that are organized and coordinated (or not) in a cycling destination could also be examined as to their contribution to a destination's tourist product and compared with the bicycle tourists' demands. The field of logistics in tourism invites for contributions on destinations' logistic systems approach and the process that SCM concept implies, and bicycle tourism product is no exception.

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