

## UNDERSTANDING THE COMPETITIVENESS OF A CYCLING TOURISM DESTINATION FROM STAKEHOLDERS' PERSPECTIVE: AN EXPLORATORY STUDY FROM MALLORCA, SPAIN. HACIA LA COMPRENSIÓN DE LA COMPETITIVIDAD DE UN DESTINO CICLOTURISTA DESDE LA PERSPECTIVA DE LAS PARTES INTERESADAS: UN ESTUDIO EXPLORATORIO DE MALLORCA, ESPAÑA.

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### ABSTRACT

Cycling tourism is constantly growing around the world. The increase in demand has been accompanied by a growth in supply, causing greater competition between destinations. Although it is well studied that competitiveness is important for a tourism destination to obtain a favourable position in the world tourism market and sustain a competitive advantage, few studies have analysed the competitiveness of cycling tourism destinations. This research conducts exploratory study of how destination stakeholders understand cycling tourism destination competitiveness. The purpose is to identify and explain what factors make a cycling tourism destination more competitive and what can be done to achieve a competitive advantage.

**Keywords:** cycling tourism; tourism destination competitiveness; factors of competitiveness; stakeholders; Mallorca.

### RESUMEN

El cicloturismo, en todo el mundo, está en constante auge. El aumento de la demanda ha ido acompañado de un crecimiento de la oferta, lo que ha provocado una mayor competencia entre los destinos. Aunque hay numerosos estudios que avalan el hecho que la competitividad es importante para que un destino turístico obtenga una posición favorable en el mercado turístico mundial y

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mantenga así su ventaja competitiva, pocos trabajos han analizado la competitividad de los destinos orientados al cicloturismo. Esta investigación realiza un estudio exploratorio de cómo los actores entienden la competitividad de los destinos de cicloturismo. El objetivo es identificar y explicar qué factores hacen que un destino cicloturista sea más competitivo y qué se puede hacer para conseguir una ventaja competitiva.

**Palabras clave:** cicloturismo; competitividad turística de los destinos; factores de competitividad; actores de interés; Mallorca.

## 1. INTRODUCCIÓN

Cycling tourism is experiencing a worldwide emergence (Lamont, 2009; Weston et al., 2012; Nilsson, 2019; Varnajot, 2020), becoming one of the main alternatives for sustainable tourism (Lumsdon, 2000; Weston et al., 2012; Chen & Cheng, 2016; Gazzola et al., 2018) and, in tandem with technological enhancements such as electronic bicycles, its appeal is expected to continue growing (Han et al., 2020). This allows new business opportunities to emerge for accommodation and food services to fulfil one's basic needs, in addition to the development of cycling-related services such as bicycle rental, luggage service or bicycle parking facilities and cycling-focused tour operators.

According to Lee & Huang (2012), the social, economic, and environmental benefits of cycling tourism have led Destination Management Organisations (DMOs) to promote new initiatives to plan and guide destination offerings towards attracting the cycling tourism market (Cox, 2012). Consequently, the cycling tourism offer has increased globally (Han et al., 2020), causing greater competitiveness among destinations, which see in cycling tourism an opportunity for local development (Ritchie & Hall, 1999; Picket, Eijgelaar & Peeters, 2013; Blondiau, Van Zeebroeck & Haubold, 2016; Agarwal & Gupta, 2021; Maggi et al., 2021).

Consequently, cycling tourism is an area of growing interest in the study not only of sports tourism, but also of tourism in general (Weed et al. 2014). Several studies have focused on the study of cycling tourism in different regions of the world (Ritchie, 1998; Lamont & Buultjens, 2011; Vujko, Plavša & Ostojić, 2013; Fernández, 2015; Kruger, Myburgh & Saayman, 2016; Xu, Yuan & Li, 2019), analysing different aspects, such as specific types of cycling tourism (Bull, 2006; LaChusse, 2006; Kruger & Saayman, 2014; Kulczycki & Halpenny, 2014), cycling tourism demand (Ritchie, Tkaczynski & Faulks, 2010; Lőrincz, Banász & Csapó, 2020), cycling events (Shipway et al., 2016; Buning & Gibson, 2016; Varnajot, 2020), cycling tourism mobility (Lumsdon, Downward & Cope, 2004; Lumsdon & Tolley, 2007), cycling tourism impacts (Burns et al., 2014) or sustainable planning

and policy implications (Faulks, Ritchie & Fluker, 2007; Lamont & Buultjens, 2011; Cox, 2012; Petino, Reina & Privitera, 2021).

However, in the literature review it has been observed that the competitiveness of cycling tourism destinations has hardly been addressed. Therefore, this research aims to contribute to furthering the debate on the factors that may influence the competitiveness of cycling tourism, understanding competitiveness, not as a simple product or service, but as a *total experience* (Dwyer et al., 2004), which is produced by a variety of destination stakeholders, who contribute to the visitor experience (Crouch, 2011).

Tourism competitiveness destinations has been widely studied and considerable number of models have been proposed (Ritchie & Crouch, 1999, 2003; Kozak & Rimmington, 1999; Hassan, 2000; Yoon, 2002; Dwyer & Kim, 2003; Enright & Newton, 2004; Omerzel, 2006; Crouch, 2011; Andrades, et al., 2014; Abreu, et al., 2018; Cronjé & du Plessis, 2020), and applied to sport tourism destinations (Hudson, Ritchie & Timur, 2004; Hallmann, Müller & Feiler, 2014; Zehrer, Smeral, & Hallmann, 2017), however, few studies have focused specifically on the competitiveness of cycling tourism destination (Mrnjavac et al., 2014; Lee & Huang, 2014). According to Happ (2021) the models and measurements used to frame tourism sport destination competitiveness were mainly based on Ritchie and Crouch (2003) and Porter (1990).

Ritchie and Crouch's model of destination competitiveness is regarded as the most comprehensive theoretical explanation of the concept (Hudson, et al., 2004; Tsai et al., 2009; Abreu, et al., 2018), however, very few studies have systematically and empirically tested the model of Ritchie and Crouch (2003) for a particular destination (Enright & Newton, 2004; Hudson et al., 2004). This model uses stakeholder opinion and feedback in constructing their approaches. Following their work, the aim of this paper is to determine which competitive factors are identified by the stakeholders-core involved in the cycling tourism destination, such as the DMO, hotels, retail, bike activity suppliers, etc., but also, considering the opinions of other non-tourist parties, which, indisputably, are also part of the tourism value chain, and specifically that of cycling tourism, such as the catering industry.

Based on the vision of the stakeholders, the aim is to contribute to the knowledge of how a destination can achieve a competitive position in the global cycling tourism market. To this end, the aim is to identify the strengths-weaknesses and opportunities-threats that the destination presents for cycling tourism, and based on these results, to be able to propose appropriate strategies to improve competitiveness. Therefore, the results of this research can be of great relevance for those

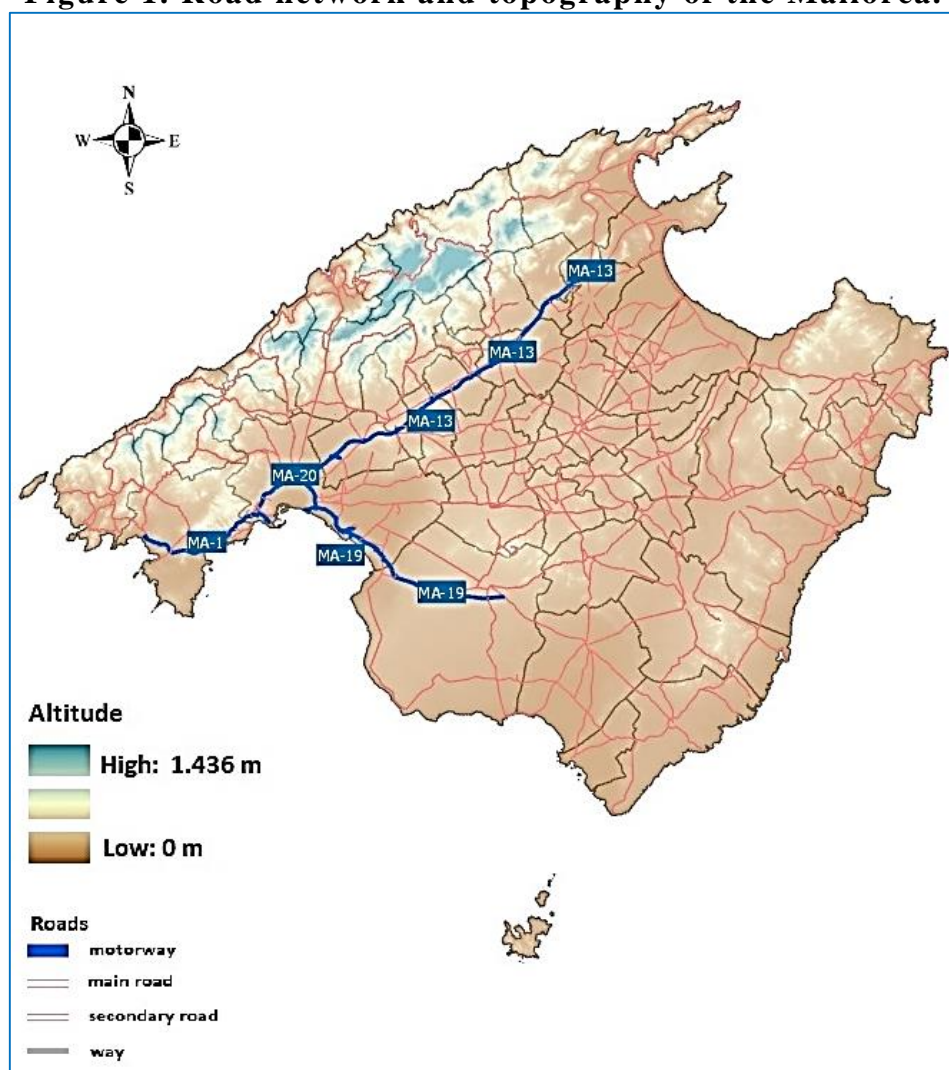
destinations that are working with cycling tourism or intend to invest in this product.

## 2. METHODOLOGY

### 2.1. Case study (Mallorca, Spain)

Mallorca is the largest of the Balearic Islands in Spain, with an area of 3,640 km<sup>2</sup>. The island has become one of the most popular tourist destinations in Europe. In 2019, before the pandemic, it received 11.8 million tourists. Although sun and beach tourism are the majority, it is worth noting that the warm climate, stunning landscapes, extensive road network and diverse topography (Figure 1), also provide ideal conditions for the practice of different sports, which has favoured a specialisation of the destination in products such as cycle tourism (Rejon-Guardia et al., 2018; Jin et al., 2022).

**Figure 1. Road network and topography of the Mallorca.**



Source: own elaboration based on IDEIB.

The case study as a research method is considered an appropriate strategy to respond to the objective of this work and to draw meaningful conclusions. This research method is chosen to adopt a holistic approach to the analysis of Mallorca as a reference destination for cycle tourism. The empirical enquiry of this research method allows for an intensive description to be included for an in-depth qualitative analysis (Ganguli & Ebrahim, 2017).

## 2.2. Data collection and methods.

A qualitative methodology based on semi-structured interviews (Longhurts, 2003; Schmidt, 2004; Hammett et al., 2015) and thematic analysis (Loubet del Bayle, 2000; Gavi, 2008; Guest et al., 2011) was used for this research to make an exploratory study, identifying and analysing the factors which influence the competitiveness of cycling tourism from the perspective of the destination's stakeholders. Semi-structured interviews provide the flexibility of the unstructured interview but with comparability to key questions (Cheng et al., 2012). It lets the interviewees develop ideas and speak more widely on the issues raised by the researcher (Finn et al., 2000).

**Table 1. Qualified stakeholders interviewed.**

Informant Code	Position	Institution
AMA	Customer Experience Manager	Hotel chain specialised in cycling tourism
ICG	Manager	Bicycle rental company for cycling tourism
EPA	Marketing and Communication Manager	Travel agency specialised in cycling tourism
GMPF	Technical Product Area Manager	Company organising events for cycling tourism
TVB	Bar and Restaurant Owners	Complementary offer (bars/restaurants specialised in cycling tourism)
JAR	Chief executive	Public Administration (Tourism Strategy Agency of the Balearic Islands)

Source: Authors.

The interviews were designed based on Ritchie & Crouch's (2003) tourism destination competitiveness model, asking a total of 18 questions with the aim of identifying issues related to the comparative and competitive advantages

of a destination which influence cycling tourism (see appendix). The interviews for this research were conducted during 2019, involving six relevant stakeholders (see Table 1), who contribute to make an exploratory study of cycling tourist experience in Mallorca, including tourism enterprises, residents, other supporting industries, destination management organisations (DMOs), and the public sector (Crouch, 2011).

After conducting the interviews and their transcription, the resulting text documents were analysed using the Atlas.Ti software. This analysis was conducted in three stages:

- 1) Automatic coding: Atlas.Ti searched for keywords related to 31 categories predefined by the researchers (table 2) by assigning text fragments to them. This coding was based on the elements of the tourism destination competitiveness model proposed by Ritchie & Crouch (2003), which is structured into 5 broad categories grouping a total of 31 sub-categories:

**Table 2. Categories and sub-categories predefined.**

Infrastructure	Visitant management
Accessibility	Crisis management
Facilitating resources	Touristic system
Hospitality	Philosophy and values
Companies	Vision
Political willingness	Positioning and brand
Natural and cultural resources	Development
Market linkages	Competitive/collaborative analysis
Complementary offer	Monitoring and assessment
Sport events	Geographic location
Superstructure	Interdependencies
Organisation and financing	Safety
Marketing and commercialisation	Appearance
Human resources	Worth
Quality of service and experience	Load capacity
Research	

Source: Authors, based on the Ritchie & Crouch's model of destination competitiveness (2003).

- 2) Manual filtering: what has been coded and does not correspond to the keyword has been deleted.
- 3) Manual coding: During the re-reading carried out from phase 2, the uncoded fragments were revised to check if they belonged to any category.

Once the coding was completed and perfected, all the fragments of each key concept were extracted in Excel format. For each coded fragment, it is possible to observe directly

which other codes have been assigned to the same fragment. In this way the relationships between the different categories are established to identify the most important competitiveness features of the destination. Finally, with the information obtained, a SWOT matrix was applied to identify the endogenous and exogenous elements that influence the competitiveness of cycling tourism destinations.

### **3. RESULTS**

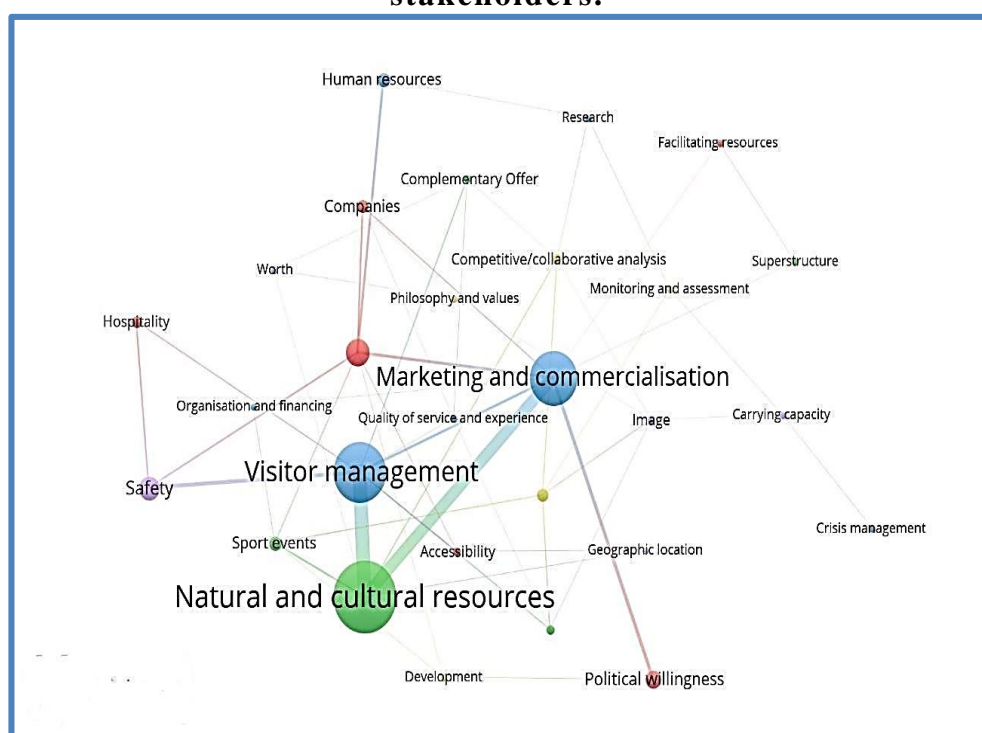
From the analysis of the interviews carried out with Atlas.Ti, it was observed that the category most highlighted by stakeholders for the competitiveness of cycling tourism was destination management (117). In second place comes the category Basic resources and attractors (80), followed by Support factors and resources (70), Destination policy, planning and development (42) and Limiting and amplifying determinants (40). The data from this research reinforces other studies (Crouch, 2010; Fyall & Garrod, 2020) highlighting the importance of destination management for tourism competitiveness.

An analysis of the frequency of the sub-categories shows that the most prominent sub-category is the one referring to natural and cultural resources (48). Its importance has been highlighted in numerous studies of destination competitiveness (Dwyer et al., 2004; Gomezelj & Mihalič, 2008; Chin et al., 2014). In second place is visitor management (44), marketing/commercialisation (38), followed by infrastructure (32), safety (18), positioning/branding (14), events (13), political will (11), business (11), competitive/collaborative analysis (10), market linkages (9), human resources (9), hospitality (8), complementary offer (7), appearance (7), monitoring and evaluation (6), service quality and experience (6), accessibility (6), carrying capacity (5), research (5), philosophy and values (5), development (5), location (5), worth (4), organisation and financing (3), superstructure (3), crisis management (2), enabling resources (2), touristic system (1), vision (1) and interdependencies (1).

In terms of code density (Figure 2), i.e., how the different subcategories are related, it is noteworthy that attractions and resources are coded in numerous fragments along with visitor management on the one hand and marketing on the other. Although to a lesser extent, another prominent connection is the one linking marketing with political will, visitor management or security with infrastructure. Wherefore, the code density offers an overview of how the agents interviewed understand the strengths and needs of cycling tourism in their destination.



**Figure 2. Importance of the categories according to the stakeholders.**



Source: Authors, based on interviews results; figure created using VOSviewer Software.

Following Crouch & Ritchie's model (2003), the qualitative results are classified into five categories of strategic elements for the tourist destination competitiveness of cycling tourism:

### **3.1. Support factors and resources**

Adequate cycling infrastructure is an essential requirement for any destination seeking to attract this market segment (Deenihan and Caulfield, 2015). According to the study by Weston et al. (2012), when choosing a route or tourist destination, the following are particularly valued: a) Safety, which is linked to low traffic density; b) Signage, related to ease of use; c) The variety of routes; and d) The quality of the pavement. Some of the interviewees highlighted that:

One of the elements highlighted by cycle tourists is the quality of the asphalt on Mallorca's roads, which makes cycling enjoyable (ICG).

In addition, Mallorca has 2,071 km of roads and paths connecting the different population centres. This dense network of roads has made possible the existence of a great diversity of cycling routes which cover the entire geography of the island. As some interviewees commented:

Mallorca offers a great variety of routes in a reduced territory, which allows for planning very diverse itineraries depending



on the objectives pursued by each cyclist, which makes this the ideal area to enjoy cycling (TVB).

In addition to infrastructure, the experts highlight the importance of the experience accumulated in tourism management by the destination's own socio-economic agents for the development of cycling tourism, stating that:

When cycling tourism began to develop, the island had already been in the tourism industry for decades and, therefore, the functioning of this business was well known (JAR).

Another important element is the need for tourist accommodation adapted to this type of customer. According to data from the website [www.mallorcahotelsonline.es](http://www.mallorcahotelsonline.es), it is estimated that in Mallorca there are more than a hundred hotels specialised in cycling tourism, which offer infrastructures and services adapted to this type of client. As one interviewee points out:

Cycling tourists are looking for bicycle parking, tools, a specialised store with products for cyclists, bicycle rental, bicycle washing services, an area for refilling water bottles and washing clothes, a gym, rollers for those days when bad weather prevents cycling, a room for stretching after training, an area for TRX, a warm water pool where you can swim all year round, and a meeting room, as well as physiotherapist, recovery and spa services, which contribute to facilitate the cyclists' muscle recovery. Finally, it should be noted that during the cycling season not only does the choice of hotel food focus on the athlete, offering a diet rich in carbohydrates and very healthy, but the hotel's television programming is also adapted to this type of customer, and all kinds of cycling events are televised (AMA).

The consolidation of cycling tourism as a product has led to create an economic ecosystem which includes intermediary companies, accommodation, rental, repair, restoration, and maintenance services specialised in this tourist segment. Different actors are involved in it, and a multitude of relationships are established between them. According to experts, this reflects the degree of sophistication which this product has achieved in the destination. Although it needs to improve in aspects such as the complementary offer, as indicated by one of the interviewees:

There are few bars and restaurants that have the necessary infrastructure and services to meet the needs of cyclists (cycle parking, isotonic drinks, healthy and light food, nutritional supplements, utensils to fix a leak, ...) (TVB).

However, having the necessary resources does not ensure the successful development of a tourist destination, other factors such as hospitality and political will are required (Callizo, 1991). In the case of cycling tourism, an association of hospitality with coexistence between cyclists and drivers on

the road has been observed. In this sense, the stakeholders interviewed highlight that:

Cycling tourists compare us with other countries and claim that we are an example to follow when it comes to overtaking and respecting cyclists by keeping distances (ICG), which allows them to feel safe on their bicycles and enjoy riding around the island (AMA).

According to those interviewed, the positive assessment received by visiting cyclists on the road safety education of local drivers is explained by the good acceptance by residents, as Mallorca has historically been a land of cycling, where great stars of the sport have emerged, such as Guillem Timoner, Joan Llaneras or Marga Fullana, who have contributed to the rooting of cycling among the local population, currently being one of the most practiced sports on the island.

The political will to promote the development of cycling tourism in Mallorca is associated with the need to diversify the sun and beach model, which has led to a concentration of demand during the summer, generating serious economic and social distortions, including the low profitability of investments and a strong seasonality of employment (Coll, 2016). This has meant that, since the end of the last century, public administrations have sought alternatives to deseasonalise tourism by promoting products such as cycling tourism (Coll & Seguí, 2016), which have demonstrated the potential of the destination to offer more than just sun and sand. This political will is backed by the tourism sector itself, which recognises in this product an opportunity to extend the season:

Traditionally, the tourist season started at Easter and lasted until the end of September, whereas nowadays, we open at the beginning of February and close at the end of November, to cater for cycling tourists (AMA).

### 3.1.2. Basic resources and attractors

In relation to the resources and values of the territory, most of the interviewees agree in identifying the climate and the landscape as the most important attractions for the practice of cycling tourism:

The cyclist does not want rain or wind, and here we have many days with favourable weather conditions for the practice of this sport (TVB). In addition to an ideal climate, we can offer a great diversity of landscapes, which make Mallorca a very attractive destination for cycling tourists (EPA).

Another attraction highlighted by the interviewees is the topography of the island:

Mallorca offers different topographical profiles, so that a cycling tourist who comes here can cycle on the plain, but also in the mountains, and this diversity of routes is very important for the cycling tourist (JAR).

Therefore, many of the cyclists that Mallorca receives are already aware of the wide range of services and leisure activities offered by the destination. In this sense, the interviewees highlight the importance of the leisure offer to improve the experience of cyclists beyond their sporting motivations:

The leisure offer available in Mallorca is a differentiating element compared to other competing destinations (AMA).

On the other hand, the experts interviewed consider that the organisation of major cycling events (Challenge Ciclista Mallorca, International Masters Cycling Week, Marcha Cicloturista Mallorca 312, ...) is a great opportunity for the promotion and dissemination of the island's cycling potential:

Cycling events contribute to positioning Mallorca as a reference destination for cycling tourism (JAR). Both professional cyclists and amateurs who participate in these types of events upload images or videos on their social networks, helping to spread the destination's appearance among cycling tourists (GMPF).

### 3.1.3. Destination management

Previous research (Crouch & Ritchie, 2003; Dredge, 2006; Volgger & Pechlaner, 2014) claims that DMOs capable of actively fostering collaboration between destination stakeholders are key to ensuring a destination's competitiveness. Although Mallorca does not have a Destination Management Organisation (DMO) for cycling tourism, it does have Strategic Tourism Segments (SET) promoted by the public administration with the aim of promoting public-private collaboration to develop tourism products with added value. There is a SET for sports tourism, in which strategies are defined and actions are planned to improve the competitiveness of cycling tourism in the Balearic Islands, such as: market studies focused on the behaviour of cycling tourists, development of cycling routes, promotional actions, etc.

Despite the efforts made in promotion, the private sector criticises the fact that on many occasions cycling tourism has been limited to forming part of generic marketing actions for the destination:

Often the promotion of cycling tourism is carried out through generalist stands or at generalist fairs (ICG), being offered as just one more activity among all those found in the destination (GMPF).

In view of this global vision, the actors highlight the need to continue moving towards a more specialised and segmented marketing and promotion strategy:

From the public administration we are working on specific promotional actions, participation in events, fam trips, press trips.... (JAR). In addition to traditional promotional channels,

we are seeing that the presence in magazines and social networks specialised in cycling is very important (EPA).

All stakeholders agree that it is important for the destination to increase its direct marketing:

Although most hotels work with sports tour operators, more and more of them have a group booking department and a website for customers to book directly (AMA). The same is true for bike rental companies, most work with sports travel agencies and tour operators, but there is a lot of investment in getting direct customers through the web (ICG).

The same happens with events, such as Mallorca 312: although we work with tour operators, we have our own official travel agency that sells a package that includes registration, accommodation, and travel, but we also use other channels such as the official event website, social networks, newsletters and trade fairs (EPA).

One of the factors that has allowed the growth of disintermediation in Mallorca has been the high rate of repeat cyclists:

As a destination we have very loyal British, German, Swiss, Belgian, and Dutch cycling tourists, but, in addition, Scandinavian and other markets that may be interesting in the future, such as Russian (GMPF), are growing. The reality is that we have more and more direct clients (approximately 70% of the total) and this is due to the fact that many of them return because they are happy with the service, we have given them in the past (ICG).

Interviewees also highlight that one of the important factors that has strengthened Mallorca as a cycling tourism destination has been its ability to adapt to changes in demand:

The first hotels that worked with cyclists only had bicycle parking, and that was all they offered, whereas now you can find a myriad of services for this type of client (GMPF). Many bicycle rental companies started out renting out tourist bicycles, and little by little we changed that concept because we saw that the cyclist is a customer who is looking for a more specialised and professional offer, so we invested to be able to offer high-end road. bicycles (ICG).

They stress the need to continue offering a quality product to maintain the satisfaction of the cycling tourists who choose us as a destination, as word of mouth is usually the best promotion:

Many customers choose us because of recommendations from their colleagues, and we must take into account that many cyclists belong to a club or are part of a cycling group, and when they return to their country and cycle, they talk about their experience in Mallorca. Therefore, if it has been positive, they recommend us as a destination (EPA).

Despite the success achieved as a cycling tourism destination, the actors interviewed do not lose sight of the fact that competitors are appearing in the Mediterranean who have also opted for cycling tourism as a deseasonalising sun and

beach product, as is the case of Croatia and Greece. On this issue, they identify that:

The emergence of new competing destinations should force us to continue improving and not become complacent with the success achieved, for which it is essential to continue investing in promotion (EPA).

According to the experts, to remain competitive in the face of new competing destinations, it is essential to work permanently on improving the quality of the service to be able to provide added value compared to its main competitors:

It is observed that customers who express a higher degree of satisfaction during their stay in our establishments are more likely to repeat their visit (AMA).

To this end, it is very important to continue working on the training of qualified professionals. Cycling tourists tend to demand certain services that require specific professionals, which has led tourist establishments to incorporate workers with non-tourist profiles:

A few years ago, it was unthinkable that our establishments would have physiotherapists, recuperators, nutritionists, or bicycle mechanics (AMA).

For any company or destination, it is very important to have the ability to generate quality content through their website and social networks, as it can help them attract and retain customers (GMPF).

This increased competition and the need to offer a product with high added value, according to the experts, makes it essential to promote research to encourage the development of innovative and quality tourist experiences for cycling tourists, which will help Mallorca to continue to be a preferred destination for cycling tourists.

According to the experts, the main developments within the cycling tourism sector have focused on:

a) the adaptation of infrastructures and the incorporation of specialised services in accommodation and catering establishments;

b) improvements in the organisation of events;

c) the use of business intelligence and active listening systems in social networks;

d) the incorporation of big data; and

e) improvements in online marketing. However, they point out that digital innovation needs to be improved:

Destinations that are not able to innovate when it comes to responding to the needs of cycling tourism 2.0 will lose competitiveness within the market (ICG).

Another challenge is to obtain data to improve efficiency in the management of cycling tourism and to be able to deal with crisis situations. According to a study by the Conselleria de Turismo y Deportes, it was estimated that 250,000 cycling tourists came to Mallorca in 2018. However, despite being one of the main tourist destinations in the world, the exact number of cyclists per year is unknown:

The public administration does not have concrete data, as when tourist motivation surveys are carried out, we can only know if they come for sport, without knowing what percentage do cycling tourism. As a destination we need to have real data by profiles, now we rely a lot on estimates and intuitions, but we really need to know what cycling tourists do during their stay, what they spend, what they say and how they value the destination (JAR).

The need-to-know customers better has led more and more cycling tourism companies to incorporate evaluation systems to measure customer satisfaction in order to adapt their products and improve the service they offer, and thus build customer loyalty:

Customer feedback helps us to improve our offer and become more competitive (AMA).

#### 3.1.4. Destination policy, planning and development.

Governments and policymakers have seen cycling tourism as a critical development driver to encourage future destination planning to enhance sustainable growth of environmental, social, and economic issues (Gazzola et al., 2018; Pröbstl-Haider et al., 2018). Experts agree that cycling tourism is the perfect ally to move towards a sustainable tourism model, as it allows a harmonious balance between environmental, economic and socio-cultural aspects:

It is a tourism with a very positive impact for the destination, as it is environmentally sustainable (it does not pollute), economically sustainable (it generates wealth) and socially sustainable (it generates employment) (TVB).

And favours the local development of municipalities that cannot offer a sun and beach product:

This type of tourism moves all over the island, which also benefits inland municipalities (GMPF). (...) this has made it possible to enhance the heritage of these places and generate new business opportunities at the local level (JAR).

This positive vision towards the development of cycling tourism led the public administration to start designing the first cycling tourism routes on the island in 1999. Since then, cycling tourism has become a key product within the destination's tourism strategy. Moreover, its development has been linked to sustainable mobility for responsible tourism. In 2018, a Cycling Path Plan was approved for the island of Mallorca, a tool that sets out the strategic lines of sustainable mobility and finances actions aimed at improving the infrastructure of the cycling path network (paving, signage, widening of shoulders, etc.).

Mallorca currently has more than 400 km of cycling touring routes (Figure 3). However, this development has focused exclusively on road cycling. One of the challenges facing Mallorca as a destination is the development of

infrastructures and services to cater for other types of cycling tourism which are growing:

Within the cycling tourism market, the demand for bikepacking, e-bikes and mountain bikes are growing, but Mallorca has hardly any infrastructures and services to meet the needs of this type of client (ICG).

**Figure 3. Information panel cycling routes in Mallorca.**



Source: Authors.

The interviewees agree that Mallorca enjoys a good position in the world's cycling tourism offer:

Beyond the traditional markets, more and more cycling tourists are arriving from other countries and continents, which shows that, all over the world, they know that Mallorca is a reference destination for cycling tourism (ICG).

However, those interviewed called for the need to create a specific tourist brand that links the values of the destination with cycling tourism:

The differential value that cycling tourists give to Mallorca should be exploited to create a high-value brand, which helps to reinforce the positioning in the market (GMPF). Relations between stakeholders have been limited to one-off collaborations between companies or between administration and companies with clear objectives: the creation of events, the promotion and marketing of cycling tourism. However, it seems that these collaborations are not sufficient, and a



network of actors should be established to ensure cooperation in cross-cutting policies, which would allow certain problems that have a negative impact on the destination to be tackled in depth:

(a) Avoiding unfair competition:

(...) there are foreign companies that come to spend the high season on the island and set up temporarily in certain tourist establishments that irregularly offer rental services for cyclists. This is an illegal offer that represents unfair competition for local businesses. It would be important that the authorities listen to us and act against this illegal offer, and that we all compete with the same rules (ICG).

b) Increase the protection of cyclists in traffic laws:

In order for the cycling tourist experience to be positive, it is necessary to ensure their safety, and, to this end, it is necessary to improve certain roads without hard shoulders, to continue to create cycling lanes on such roads wherever possible, to conduct awareness campaigns for drivers, and to reform road safety laws to make them fairer (GMPF).

c) Strengthen social acceptance:

(...) among the local population some critical voices are beginning to emerge towards cycling tourists during the high season. To prevent this rejection from growing, policy formulation is essential to raise awareness of the importance of cycling tourism for the local economy (TVB).

At the destination level, the main objective is to improve the planning and management of the tourism product through the implementation of a set of technological tools (for promotion and interaction with tourists, safety and comfort, intelligent management of the destination, among others), some of which are already in operation, to promote strategic information for tourists traveling to Mallorca. For example, the initiative of the Sustainable Tourism Observatory of Mallorca, a platform for statistical information, knowledge and tourist intelligence of the destination, stands out.

### 3.1.5. Limiting and amplifying determinants.

Geographical proximity to the world's main outbound cycling tourism markets plays a very important role in the competitiveness of the destination:

The fact that we are only 2 or 3 hours by plane from the main cycling tourism issuing countries gives us an advantageous position to attract this market segment (EPA).

Furthermore, within the destination itself, it is worth highlighting the location of the towns in the territory:

The short distance between population centres, no more than 15 kilometres, makes it easier for cycling tourists to

resolve any unforeseen events that may arise during their route (TVB).

The appearance of the tourist destination is key for tourists who want to visit a place. On this issue, the interviewees highlight that the island has a consolidated image as a cycling tourism destination, based on the quality of its offer and infrastructures, the variety of routes, the climate and landscape and a wide range of complementary services. Regarding the process of shaping this representation, they state that:

Recommendations from cycling tourists have been the main element in disseminating the image of Mallorca as a cycling destination (GMPF). In addition, the image of the destination has been reinforced by the presence of professional teams that come to organise training rallies and the Challenge Ciclista Mallorca, which attracts the big stars of world cycling (JAR).

Experts stress that the safety of cyclists on the roads is one of their main concerns, as they consider it to be a crucial factor in the attractiveness of the destination for cycling tourists. On this subject, there is unanimous agreement that the number of accidents involving cyclists is low in Mallorca:

One of the things our customers value most is the safety with which they can ride on the island's roads (AMA).

In general, the experts consulted are optimistic about the growth potential of cycling tourism in Mallorca, considering the resources, infrastructures, facilities, and services available. However, they warn that in certain areas there are occasional situations of overcrowding which should be monitored to prevent them from leading to a loss of quality of life for residents or a loss of quality of experience for cycling tourists:

During the months of high cycling tourism season, in certain parts of the island such as the Serra de Tramuntana, many cyclists congregate, which sometimes generates conflicts between neighbours and cyclists (ICG).

### **3.2. SWOT Analysis of Mallorca cycling tourism competitiveness.**

In this part, a SWOT analysis has been applied to evaluate the strengths, weaknesses, opportunities, and threats of cycling tourism in Mallorca according to the results of the stakeholder interviews. This analysis has made it possible to identify those actions and lines of work that can contribute to optimising the strengths and opportunities of the cycling tourism sector, and those that need to be worked on to counteract its weaknesses and threats.

**Table 3. SWOT analysis for the competitiveness of cycling tourism in Mallorca.**

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>- Experience of the destination in tourism management.</li> <li>- Wide range of accommodation and service companies specialising in cycling tourism.</li> <li>- Political will.</li> <li>- Cycling tourism routes in a good state of conservation.</li> <li>- Favourable climate for cycle tourism.</li> <li>- Availability of favourable topography.</li> <li>- Attractive landscape.</li> <li>- Links with the traditional market.</li> <li>- Wide range of leisure activities.</li> <li>- Capacity for the organisation of cycling tourism events.</li> <li>- Collaboration initiatives between the public and private sectors.</li> <li>- High degree of satisfaction among cycling tourists.</li> <li>- High loyalty of cycling tourists.</li> <li>- Availability of specialised human resources.</li> <li>- Promotion of sustainable tourism.</li> <li>- Incorporation of cycling tourism in territorial and tourism planning.</li> <li>- Capacity for deseasonalisation.</li> <li>- Good positioning of the destination at international level.</li> <li>- Geographical proximity to the markets.</li> <li>- Image as a destination specialising in cycling tourism.</li> <li>- Good road safety.</li> </ul>	<ul style="list-style-type: none"> <li>- The catering sector offers few services for cycling tourists.</li> <li>- Cycling tourism events generate disturbances on the mobility of residents.</li> <li>- No Destination Management Organisation (DMO) oriented product.</li> <li>- Little promotion at specialised fairs.</li> <li>- Lack of an organised network of cycling tourism stakeholders.</li> <li>- Little digital innovation.</li> <li>- Lack of a brand that links the destination with cycle tourism.</li> <li>- No comprehensive cycling tourism product is offered.</li> <li>- Existence of unfair competition.</li> <li>- Lack technological tools to improve the planning and management of the tourism product</li> <li>- Occasional overcrowding on certain roads during the high season for cycling tourism.</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>- Lengthening of the tourist season.</li> <li>- Image as a sustainable destination.</li> <li>- Boosting local development.</li> <li>- Conservation and improvement of roads and rural paths.</li> <li>- Protection and conservation of natural and cultural heritage.</li> <li>- Possibility of increasing direct marketing.</li> <li>- Capacity for interaction with other sectors.</li> <li>- Development of sustainable tourist mobility.</li> <li>- To promote research and innovation.</li> <li>- Capacity for crisis management.</li> <li>- Potential for growth.</li> <li>- Growing demand for cycle tourism.</li> <li>- New forms of cycling tourism (electric bicycles).</li> </ul>	<ul style="list-style-type: none"> <li>- Trivialisation of the product.</li> <li>- The effects of climate change on the comfort of cycling tourism.</li> <li>- Landscape degradation of the destination.</li> <li>- Emergence of new destinations for cycling tourism.</li> <li>- Failure to invest in the training of professionals to work in cycling tourism.</li> <li>- Lack of coordination in promotion.</li> <li>- Road insecurity.</li> <li>- Traffic congestion.</li> <li>- Increased social rejection.</li> </ul>

Source: Authors, based on interviews results

#### **4. CONCLUSIONS**

Cycling is increasingly present in society, whether for sport, health, or sustainable mobility (Gaysemeier et al., 2015; Vujko et al., 2017; Han et al., 2020), and therefore cycling holidays are becoming more and more popular. Moreover, cycling is closely related to sustainable tourism (Han et al., 2017; Chen & Cheng, 2016), since, as Leiper (1990) asserts, the relationship between means of transport and tourism is essential to understand the tourist destination and the ecological impact of tourist activity.

Wherefore, some authors such as Serna et al., (2017) or Nilsson (2019) highlight that cycling is on the agenda of the main political actors for the sustainable tourist development of their destinations. In this context, cycling is set to play an important role as a sustainable means of transport and as a strategic key driver of sustainable tourism (Gazzola et al., 2018), which is causing cycling tourism to become, for many destinations, one of the main products within their tourist development strategies. Therefore, it is important that destinations more strongly reflect on factors affecting their competitiveness (Happ, 2021). This case study can help destinations seeking to orient their policies and actions for the development and management of cycling tourism, with the aim of adopting the principles of competitiveness.

Taking everything into consideration, this research has analysed the factors which influence the competitiveness of cycling tourism destinations from the perspective of the stakeholders. The results obtained contribute to reaffirm the contributions made by other studies (Weston et al., 2012; Meschik, 2012; Lee, Chen & Huang, 2014; Meng & Han, 2019) which indicate that, when choosing a destination, cycling tourists particularly value: the variety of routes, road quality, specialised accommodation and catering services, safety (low incidence of accidents), as well as other resources such as the topography of the territory, the quality of the landscape and the climate. Therefore, whether a destination is successful in the development of cycling tourism depends on these factors.

In the case of Mallorca, both the public administration and the business sector, aware of these social changes and the potential of the destination for cycling tourism, have worked on the adaptation of infrastructures and services to capture this growing demand for sports tourism.

The results have been so positive that Mallorca has become one of the most important cycling tourism destinations in the world. Cycling tourism has progressively articulated its own system within a wider tourism system. Its strength is such that, at present, cycling tourism is the product which triggers the start of the tourist season in Mallorca, to such an extent

that it has become a strategic product within the destination itself.

The success has been such that the stakeholders themselves recognise that during the high season there are problems of overcrowding on certain roads on the island. However, they do not envisage a scenario of a decrease in tourism; on the contrary, they are convinced of the possibilities for growth which cycling tourism still has on the island, extending the current cycling tourism season. The stakeholders' position on the benefits of cycling tourism coincides with those provided by other studies (Gredičak & Demonja, 2019). Cycling tourism is associated with a form of sustainable tourism of high value for the destination (Bielinski et al., 2019), which contributes to deseasonalisation, attracting tourists with high purchasing power, redistributing wealth territorially, and generating a low impact on the environment.

Nevertheless, stakeholders associate this growth potential with the destination's ability to adapt to a rapidly changing environment. Hence, the technological and knowledge changes affecting demand itself must be considered, which is becoming increasingly sophisticated and makes the competitiveness of the destination depend on its ability to customise the offer to the new needs of cycling tourists. Therefore, the stakeholders consider that it is essential to continue investing in research, development, and innovation (R&D&I) to improve the value of the product and the positioning of the destination in an increasingly global market.

The tourism stakeholders interviewed are aware that they are interdependent and that, to improve the competitiveness of the destination and their individual position in the market, they must work together to offer an integrated, attractive, and satisfactory product for the cycling tourist.

On the other hand, it is necessary to strengthen public-private alliances to generate a collaborative space which enables the different needs of the sector to be tackled jointly: to improve in-depth knowledge of the client and their behaviour through technological tools; to continue improving infrastructures and services to adapt to changes in the requirements of this type of client; to avoid unfair competition; to create a brand linked to cycling; to seek new markets; to develop further specialised promotion; to conduct awareness and sensitisation campaigns to prevent accidents involving cyclists, etc. All the initiatives proposed are aimed at maintaining competitiveness ratios, focusing on attracting new tourists and building the loyalty of those who already visit us, as well as extending the season.

Like other studies such as that of Vujko et al. (2013), this study has shown that hospitality is one of the elements that can generate a competitive advantage for a cycling tourism destination. Its good acceptance by the different stakeholders

is associated with its ability to extend the tourist season beyond the traditional summer months and its capacity to boost local development in the villages of the island's interior. Not only have these achievements been positively valued by the public administration and private companies, but they have also enjoyed the support of a large part of local society. This unwavering support is expected to remain intact, if the limits of the load capacity of the destination are not exceeded since, if this were to happen, conflicts between residents and cycling tourists would increase, leading to rejection by the local population, which would negatively affect the depiction of Mallorca as an ideal destination for cycling tourism. To prevent this scenario from happening, it is indispensable to adopt measures to avoid a massive influx of cycling tourists which could break the existing harmonious balance between cycling tourism and the destination, the key to understanding the success of its development on the island.

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