



AMAZON OF EUROPE BIKE TRAIL

Output 3.1 Socio-economic analysis of tourism potentials

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Abstract

Amazon of Europe Bike Trail passes along Mura, Drava and Danube rivers through five countries (Austria, Slovenia, Croatia, Hungary and Serbia), 11 NUTS 3 regions and 10 protected areas. This stunning riverine landscape contains both amazing natural beauty and rich cultural heritage, thus representing a great tourist potential. To develop the Amazon of Europe Bike Trail as an advanced flagship cycling product, existing cycling routes will be connected and equipped with corresponding infrastructure (resting areas, info boards and info points), resulting in approximately 1.400 km of joint bike trails along both banks of the Mura, Drava and Danube within the planned transboundary biosphere reserve.

This document provides the analysis of the social profile and the main characteristics of touristic activities of the area. The Amazon of Europe (NUTS 3 level) covers the area of 22.740,29 km² with the population of 2.084.658 people. The analysis shows the trend of emigration of people from the area in the years 2013-2017. In the similar period (2012-2016) GDP at current market prices and number of employments were growing.

Analysis of tourism trends shows that in the year 2017, the Amazon of Europe (NUTS 3 level) recorded approximately 3,2 million tourist arrivals with the annual growth rate 2,7% from the year 2016 to 2017 and approximately 9,7 million overnight stays with the annual growth rate 2,1% from the year 2016 to 2017, with the highest numbers of tourist arrivals and overnight stays in June and July. Existing touristic offer is quite well developed, including in total 362 restaurants, 548 accommodations and 15.907 beds within the area of 10 km away from the cycling route/river. The highest number of available beds is in 4* hotels, followed by 3* hotels, private apartments and campsites. Near the bike trail there are in total 53 bike stops, 36 bike rentals, 52 bike repairs and 61 bike shops. The area is in general well covered with additional services, including guided tours, wellness activities, bird watching, horse riding, kayaking, canoeing, rafting and boat tours.

The most typical current visitor of the Amazon of Europe is either female or male from Germany aged between 30-50 years. On average she/he stays on holidays for 2-3 days and spends 30-60 € per day. She/he is travelling alone, with family or with a small group of friends. She/he likes natural beauty, wellness, touristic manifestations, cycling and cultural attractions.

The analysis has shown that both tourism in general and cycling tourism in particular are already present in the most parts of the Amazon of Europe, however, there is still space for further tourism development in order to reach its optimal potential. Despite the lack of tourism and cycling infrastructure in some areas the region shows promising prospects to become a popular sustainable cycling destination due to its pristine nature, biodiversity and rich cultural heritage. Based on the findings, the partnership of the project is developing a flagship sustainable tourism product Amazon of Europe Bike Trail that will connect existing bike routes in five participating countries into a joint bookable product while at the same time valorising the environment. In order to establish a long-term sustainable tourism destination where visitors can peacefully cycle along the rivers and relax, mass tourism will be avoided. The study represents comprehensive analysis before launching the tourism product and will serve as a benchmark for further comparisons after enhancing the eco-tourism opportunities in the region.

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1 Introduction

1.1 Amazon of Europe Bike Trail project presentation

The Amazon of Europe area represents the largest natural river system in Central Europe. Amazing river landscapes along Mura, Drava and Danube will soon be protected as the world's first 5-country biosphere reserve. Under UNESCO protection within the Man and the Biosphere programme, biosphere reserves are model regions where nature conservation goes hand in hand with sustainable regional development. However, despite over 20 years of efforts in protecting the area, the 11 border regions of AT, SI, HR, HU and SR are underdeveloped, facing loss of jobs and emigration.

The Amazon of Europe Bike Trail project is funded connects 15 project partners and 10 associated partners in developing a model for sustainable mobility and unique tourism product along the future five-country UNESCO Biosphere Reserve "Mura-Drava-Danube".

Apart from developing a tourism product, the project enhances cooperation between regions and protected areas within the planned transboundary biosphere reserve, contributing to its overall success. The Amazon of Europe Bike Trail project also serves as a platform for sustainable development of areas within the protected zones, establishing the Mura-Drava-Danube region as a five-country sustainable ecotourism macro-destination. Once established, the trail will generate new jobs and create new transboundary connections, establishing a way to support projects that deal with regional development and nature protection in the area.

To develop the Amazon of Europe Bike Trail as an advanced flagship for a sustainable product and a unique brand, 25 organisations will first establish the organisational system, resulting in a joint bookable product with a clear and unique selling proposition for incredible riverine landscapes. Based on nature-oriented visitor guidance, existing cycling routes will be connected and equipped with corresponding infrastructure (resting areas, info boards and info points), resulting in approximately 1.400 km of joint bike trails along both banks of the Mura, Drava and Danube within the planned transboundary biosphere reserve.

Aside from cyclists, the Amazon of Europe Bike Trail is open to all visitors and offers spectacular natural landscapes and possibilities for various leisure activities making it a great destination for all nature lovers.

1.2 Introduction to Socio-economic analysis of tourism potentials

The socio-economic assessment analyses the social, cultural and economic conditions of communities and regions in the planned Transboundary UNESCO Biosphere Reserve Mura-Drava-Danube (hereafter referred to as "TBR MDD"), so-called Amazon of Europe. It includes an overview of the current situation in the hospitality sector in the 10 included regions, analysing capacities for sustainable tourism and visitor trends. Such overview forms a basis for developing close cooperation with all target groups in the area, as well as enabling future

comparison of the impact of the biking product Amazon of Europe Bike Trail on the social and economic situation.

1.2.1 Objectives

Objectives of the analysis are:

- to provide an overview of the socio-economic features of the areas of TBR MDD,
- to analyse existing tourism capacities,
- to analyse current visitor trends,
- to set the basis for future comparison of socio-economic development,
- to assess impact of the cycling tourism product on the region.

With this analysis:

- We can forecast how many cyclists we can expect.
- We know about general demands and behaviour of our potential guests.
- We can compare how the demands of those potential guests fit to the guests already in our region (and to our infrastructure we already have, and we plan).

1.2.2 Methodology

Firstly, the analysis shows **the reasons why the Amazon of Europe area is special, presenting the included regions and protected areas** from 5 countries. Spanning across border regions of Austria, Croatia, Hungary, Serbia and Slovenia, the lower courses of the Drava and Mura rivers and related sections of the Danube are among Europe's most ecologically important riverine areas: the so-called "Amazon of Europe". The rivers form 700 kilometres long green belt connecting almost 8.499,28 km² of highly valuable natural and cultural landscapes from all five countries. **An overview of the current socio-economic situation** in the area is prepared covering border areas of the 5 countries: comparing the key demographic trends including population, age structure, gross domestic product at current market prices, employment and migration.

Secondly, the analysis focuses on **the key indicators representing tourism trends:** number of overnight stays and tourist arrivals.

Thirdly, the following chapter presents a **market analysis with the focus on the existing tourism supply in the area**, including:

- existing infrastructure, from accommodation to tour operators and cycling related infrastructure,
- attractions and activities, ranging from nature attractions and cultural heritage to festivals, events, relevant implemented projects and regional brands,
- accessibility and transportation possibilities.

Moreover, an **analysis of the existing demand of visitors in the area** is included, with focus on sustainable tourism, presenting the features of typical visitors: where do they come from, how long they stay, how much they spend, what is their motivation to visit the area etc.

Following the analysis of the collected data from primary and secondary sources, a qualitative **SWOT analysis** presents the key strengths and weaknesses of the current tourism situation and demonstrates opportunities and threats for its future development. Based on the analysis of trends from the year 2018, a projections impact analysis of the introduced biking product on the tourism sector.

Methodology includes the following methods and techniques:

- desk analysis of secondary data from various sources: Eurostat, national and regional statistical offices, tourism info points and organisations,
- analysis of primary data collected by project partners with desk and/or field analysis and from workshops with relevant stakeholders,
- data comparison,
- financial projections of the impact of AoE Bike Trail product.

The data for the first and second chapter is analysed based on the **accessible secondary data for the regions at the NUTS 3 level**, covering years 2000, 2010, 2015, 2016 and 2017. Secondary data is collected from Eurostat, national statistical offices and tourism boards.

The data for the third and fourth chapter is **collected from primary sources**: tourism boards, tourism offices, service providers, and from focus groups and questionnaires used at workshops with relevant stakeholders.

SWOT analysis and financial projections of the impact of a new integrated tourism product AoE Bike Trail are prepared based on the data analysis, comparison and projections calculated following trends and impact of similar tourism products.

1.2.3 Limitations

Limitations of the analysis cover these four categories:

1. Geographical area:
 - NUTS 3 level presents broader area than the biosphere reserve area; the data only for the area included in the biosphere reserve is not available.
 - Data is gathered on different levels for different indicators (NUTS 3 vs. area up to 10 km away from the cycling route/river).
2. Availability of data:
 - Some indicators are available only at the national level or NUTS2 level, we used most accurate data.
 - Not all data is available in all countries.
3. Collection of primary data: there is a challenge of collecting comparable data from primary sources.
4. Comparability of data:
 - There is a challenge of comparing data from various data which do not necessarily represent the same phenomenon.
 - In the respective countries the available socio-economic data is from different years.

Despite several challenges and limitations, we aimed to prepare the analysis demonstrating an accurate profile of the tourism potentials in the Amazon of Europe, providing the basis for developing sustainable tourism products, attracting new visitors, providing economic benefits for the inhabitants, and returning profits also back to nature.

2 Presentation of the Amazon of Europe area

Spanning across Austria, Croatia, Hungary, Serbia and Slovenia, the lower courses of the Drava and Mura rivers and related sections of the Danube are among Europe’s most ecologically important riverine areas: the so-called “Amazon of Europe” (hereafter referred to as “AoE”).

The rivers form 700 kilometres long “green belt” connecting almost 8.499,28 km² of highly valuable natural and cultural landscapes from all five countries and shall therefore become a symbol of unity by becoming world’s first five country Transboundary UNESCO Biosphere Reserve “Mura-Drava-Danube”. The future Transboundary Biosphere Reserve “Mura-Drava-Danube” altogether covers 2,5% of the total surface of the respective five countries.

Figure 1: Future Trans-Boundary River System of the Mura, Drava and Danube

Future Transboundary UNESCO Biosphere Reserve „Mura-Drava-Danube“ (TBR MDD)



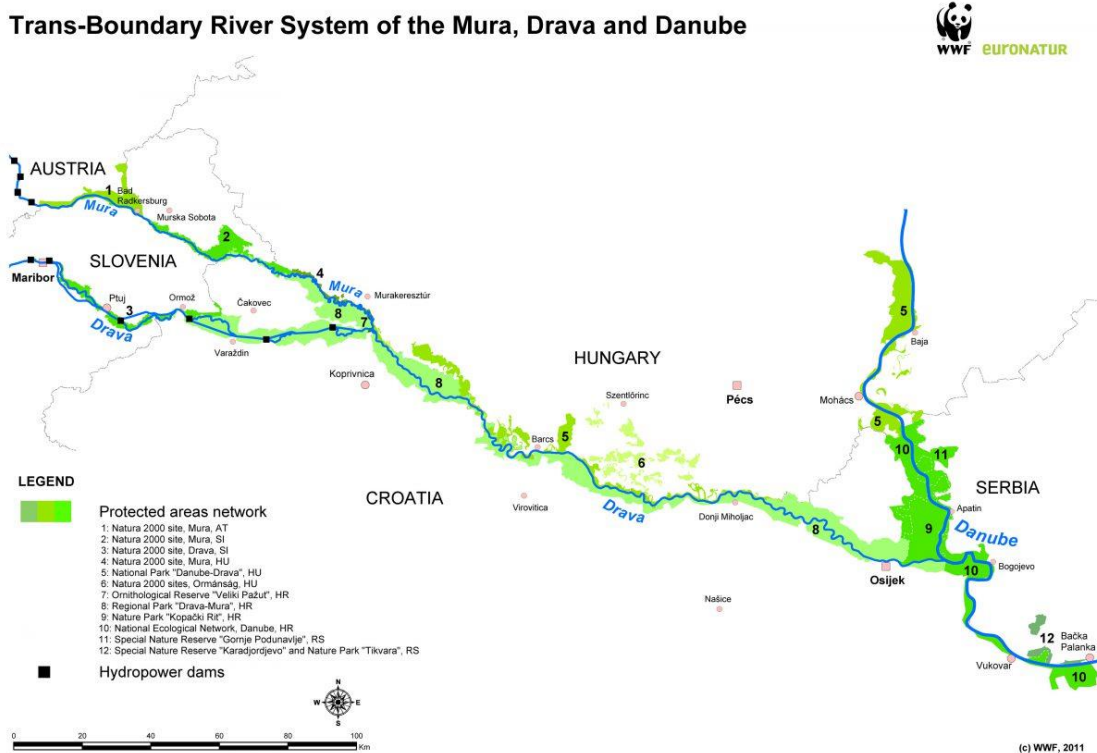
Copyright: WWF, 2011

Despite numerous man-made changes in the past, this stunning river landscape hosts an amazing biological diversity and is a hotspot of rare natural habitats such as large floodplain forests, river islands, gravel and sand banks, side branches and oxbows. These habitats are home to the highest density of breeding pairs of white-tailed eagles in Continental Europe and other endangered species such as the little tern, black stork, beaver, otter and the nearly

extinct ship sturgeon. Every year, more than 250.000 migratory waterfowls use the rivers to rest and to feed.

A coherent network of 12 protected areas along the rivers highlight their ecological values including the world famous “Kopački Rit” Nature Park at the Danube-Drava confluence, “Drava-Mura” Regional Park in Croatia, “Gornje Podunavlje” Special Nature Reserve in Serbia and the “Danube-Drava” National Park in Hungary as well as – Biosphere Reserve Mura in Slovenia and Natura 2000 Site and Protected Landscape, Mura in Austria (Amazon of Europe, 2019). Natura 2000 sites in the TBR MDD offer new possible financing opportunities for further development of the area through the LIFE programme - EU’s funding instrument for the environment and climate action. In total they represent 2,5% of the total Natura 2000 surface of the five countries in question.

Figure 2: Protected areas partially included in the Trans-Boundary River System of the Mura, Drava and Danube



The Table 1 presents all protected areas that are partially included in the future Transnational Biosphere Reserve Mura-Drava-Danube. However, not all of them are a part of the Amazon of Europe Bike Trail project territory (protected areas numbered 3, 6, 7).

Table 1: Sizes of protected areas that are partially included in TBR MDD

No.	NAME OF PROTECTED AREA	COUNTRY	SIZE (km ²)
1	Natura 2000 Site and Protected Landscape, Mura	Austria	21,59
2	Natura 2000 Site, Mura	Slovenia	127,67
3	Natura 2000 Site, Drava	Slovenia	95,35
4	Natura 2000 Site, Mura	Hungary	21,35
5	National Park Danube-Drava	Hungary	504,41
6	Natura 2000 Site, Ormánság	Hungary	14,14
7	Ornithological Reserve Veliki Pažut	Croatia	5,71
8	Regional Park Drava-Mura, Natura 2000	Croatia	876,81
9	Nature Park and Special Zoological Reserve Kopački Rit	Croatia	231,26
10	National Ecological Network, Danube	Croatia	133,49
11	Special Nature Reserve Gornje Podunavlje	Serbia	196,05
12	Special Nature Reserve Karadjordjevo	Serbia	41,84
	Nature Park Tikvara	Serbia	5,53



Total size of all protected areas partially included in the TBR MDD: **2.275,20 km²**

The Table 2 presents the share of Natura 2000 sites' surface included the TBR MDD by countries.

Table 2: Share of Natura 2000 sites' surface in the TBR MDD

Country	Share of Natura 2000 sites' surface in the TBR MDD
Austria	0,2%
Slovenia	2,9%
Croatia	4,3%
Hungary	0,2%
Serbia	0,0%

The Table 3 presents the sizes of future TBR MDD and the % of TBR MDD surface by countries.

Table 3: Sizes of TBR MDD area by countries

No.	COUNTRY	SIZE of TBR MDD (km ²)	% of TBR MDD surface out of whole country territory
1	Austria (not yet declared a Biosphere Reserve by UNESCO)	131,80	0,2%
2	Slovenia	286,52	1,4%
3	Hungary	2.356,00	7,0%
4	Croatia	3.958,61	2,5%
5	Serbia	1.766,49	2,0%

Source: UNESCO Transboundary Biosphere Reserve "Mura-Drava-Danube", Screening Process for Nomination, Working document (E.C.O., 2019)



Total size of the future TBR MDD: **8.499,42 km²**

The Table 4 presents the major cities in the Amazon of Europe area by countries.

Table 4: Major cities in the Amazon of Europe area by countries

Country	Major cities in the Amazon of Europe area
Austria	Bad Radkersburg
Slovenia	Murska Sobota, Lendava
Croatia	Čakovec, Varaždin, Koprivnica, Virovitica, Donji Miholjac, Osijek
Hungary	Nagykanizsa, Csurgó, Nagyatád, Barcs, Kaposvár, Pécs, Harkány
Serbia	Apatin, Sombor

Aside from natural beauty the Amazon of Europe is very rich in cultural heritage and local crafts that can be found as well in the cities, as in the rural areas. Ancient castles, picturesque churches, museums and traditional watermills are only a few examples of the most typical cultural attractions in the area. Moreover, many interesting festivals take place in the region including fairs, cultural, music, dance and cycling festivals that are very attractive for potential visitors. Rich natural and cultural heritage of the area therefore represent a great opportunity for further development and strengthening a tourism economy in the region.

Detailed information about cultural attractions, festivals and events can be found in the chapter 6.3.1.

Figure 3: Old Town Bad Radkersburg in Eastern Syria



Copyrights: Tourismusregion Bad Radkersburg

Figure 4: Vinarium observation tower in Pomurska region



Copyrights: TIC Lendava

Figure 5: Watermill in Međimurje County



Copyrights: Tourism board of Međimurje County

Figure 6: Lovászi Bunker in Zala County



Copyrights: Kerka-völgye Baráti Kör Egyesület

Figure 7: Orthodox church in Apatin



Copyrights: Municipality of Apatin

2.1 NUTS 3 regions of the Amazon of Europe

The Amazon of Europe area stretches across five countries and 10 NUTS 3 regions:

- Austria: Eastern Styria,
- Slovenia: Pomurska region,
- Croatia: Međimurje County, Osijek-Baranja County, Koprivnica-Križevci County, Virovitica-Podravina County,
- Hungary: Zala County, Somogy County, Baranya County,
- Serbia: West Bačka District.

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Amazon of Europe Bike Trail will also go through NUTS 3 region Varaždin County that is a part of the Amazon of Europe area as well, however this region is excluded from the analysis because it's not involved in the Amazon of Europe Bike Trail project and therefore we were unable to retrieve the data.

The NUTS 3 regions in the Amazon of Europe area cover 8,5% of the total surface of the five countries in which they're located (Austria, Slovenia, Croatia, Hungary and Serbia) and therefore, they represent a substantial part of national territories.

In Figure 8 the whole surface of NUTS 3 regions partially included in the Amazon of Europe area is graphically presented.

Figure 8: NUTS 3 regions of the Amazon of Europe area

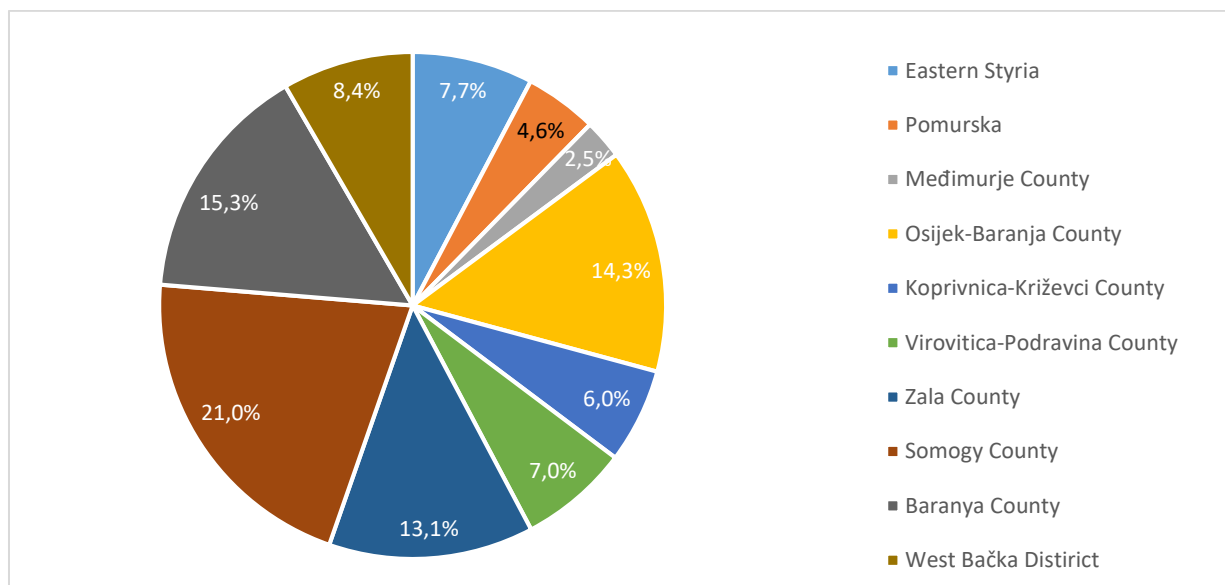
Amazon of Europe area - NUTS 3 regions



Table 5: The sizes of NUTS 3 regions of the Amazon of Europe

NUTS 3 ID	NAME IN ORIGINAL LANGUAGE	NAME IN ENGLISH	SIZE OF NUTS 3 REGION (km ²)	% of NUTS 3 surface out of whole country territory
AT224	Oststeiermark	Eastern Styria	2.231,36	2,7%
SI031	Pomurska	Pomurska	1.337,00	6,6%
HR046	Međimurska županija	Međimurje County	729,00	15,3%
HR04B	Osječko-baranjska županija	Osijek-Baranja County	4.149,00	15,3%
HR045	Koprivničko-križevačka županija	Koprivnica-Križevci County	1.748,00	2,7%
HR048	Virovitičko-podravski županija	Virovitica-Podravina County	2.024,00	2,7%
HU223	Zala	Zala County	3.784,84	6,6%
HU232	Somogy	Somogy County	6.065,09	15,3%
HU231	Baranya	Baranya County	4.429,60	15,3%
RS121	Zapadnobački upravni okrug	West Bačka District	2.420,00	2,7%

Diagram 1: % of surface of NUTS 3 regions in the Amazon of Europe area



The largest NUTS 3 region in the Amazon of Europe area is Somogy County with the size of 6.065 km² covering 21,0% of the whole AoE. It is followed by Baranya County (4.430 km²; 15,3% of the AoE), Osijek-Baranja County (4.149 km²; 14,3% of the AoE) and Zala County (3.785 km²; 13,1% of the AoE). The smallest two NUTS 3 regions are Međimurje County with the size of 729 km² covering 2,5% of the AoE and Pomurska region with the size of 1.337 m² covering 4,6% of the AoE. The shares of surface of the other four NUTS 3 regions vary from 6,0% to 8,4% of the whole AoE.

3 Socio-economic profile

This chapter provides a socio-economic profile of the Amazon of Europe area by comparing the key demographical indicators.

For defining socio-economic profile of the region, the data is collected on NUTS 3 level for the years 2000, 2010, 2015, 2016 and 2017, with the exception of the data for the indicator Net migration plus statistical adjustment that is collected on NUTS 3 level for the years 2013-2017.

Sources of secondary data used: regional, national and Eurostat statistics.

Demographic indicators included in the analysis are:

- **Net migration plus statistical adjustment:** Net migration plus statistical adjustment is the difference between total population change and natural change where population change is the difference in the size of a population between the end and the beginning of a one year and natural population change the number of live births minus the number of deaths. The statistics on 'net migration plus statistical adjustment' are therefore affected by all the statistical inaccuracies in the two components of this equation, especially population change. The indicator shows the presence of either emigration or immigration in the area of interest (Eurostat, 2018).
- **Crude rate of net migration plus statistical adjustment:** Crude rate of net migration plus statistical adjustment is the ratio of net migration plus statistical adjustment during the year to the average population in that year. The value is expressed per 1.000 inhabitants (Eurostat, 2018).
- **Employment (1.000 persons):** The employment level is defined as the number people engaged in productive activities in an economy. The concept includes both employees and the self-employed. The two main measures used for employment are the number of persons employed or the number of employees (Eurostat, 2018).
- **Employment rate:** Employment rates are defined as a measure of the extent to which available labour resources (people available to work) are being used. They are calculated as the ratio of the employed to the working age population. The working age population refers to people aged 15 to 64. This indicator is presented as a percentage of working age population (OECD data, 2018).
- **GDP (gross domestic product) at current market prices:** GDP at current market prices is an indicator for a region's economic situation. It reflects the total value of all goods and services produced less the value of goods and services used for intermediate consumption in their production. It's presented at current prices (Eurostat, 2018).

The calculations of the indicators for the Amazon of Europe area (Net migration plus statistical adjustment, Net migration plus statistical adjustment rate, GDP at current market prices (€/inhabitant), Employment (1.000 persons), Employment rate are based on the average values of all NUTS 3 regions included in the area.

Table 6 (below) shows the socio-economic profile of the Amazon of Europe area.

Table 6: Socio-economic profile of the Amazon of Europe area

AMAZON OF EUROPE – year 2017	
Total surface of the region	22.740,29 km ²
Number of inhabitants	2.084.658
Net migration plus statistical adjustment for the year 2017	-1.115
Crude rate of net migration plus statistical adjustment (per 1.000 inhabitants) for the year 2017	-6,9
GDP at current market prices (€/inhabitant) for the year 2016*	10.420 €
Average national GDP at current market prices (€/inhabitant) for the countries included in the Amazon of Europe for the year 2016*	17.660 €
Employment (1.000 persons) for the year 2016**	79,07
Employment rate for the year 2016**	55,05%

* the data for the year 2017 is not available; due to unavailability of data for West Bačka District the GDP number of the whole Vojvodina region is included in the calculation of the indicator for the whole Amazon of Europe area

** the data for the year 2017 is not available; data for West Bačka District is excluded from the indicator due to unavailability

Diagram 2: Age distribution of residents in the AoE (-West Bačka District)

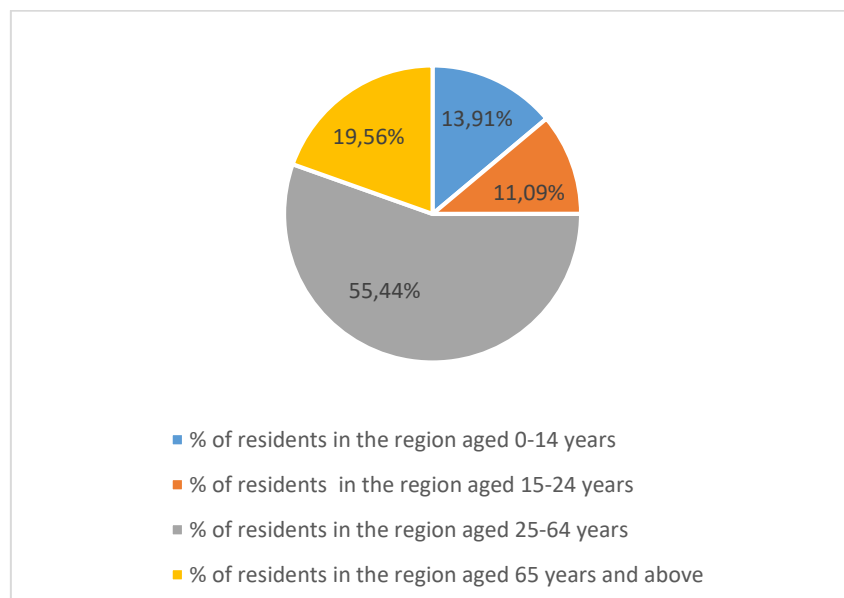
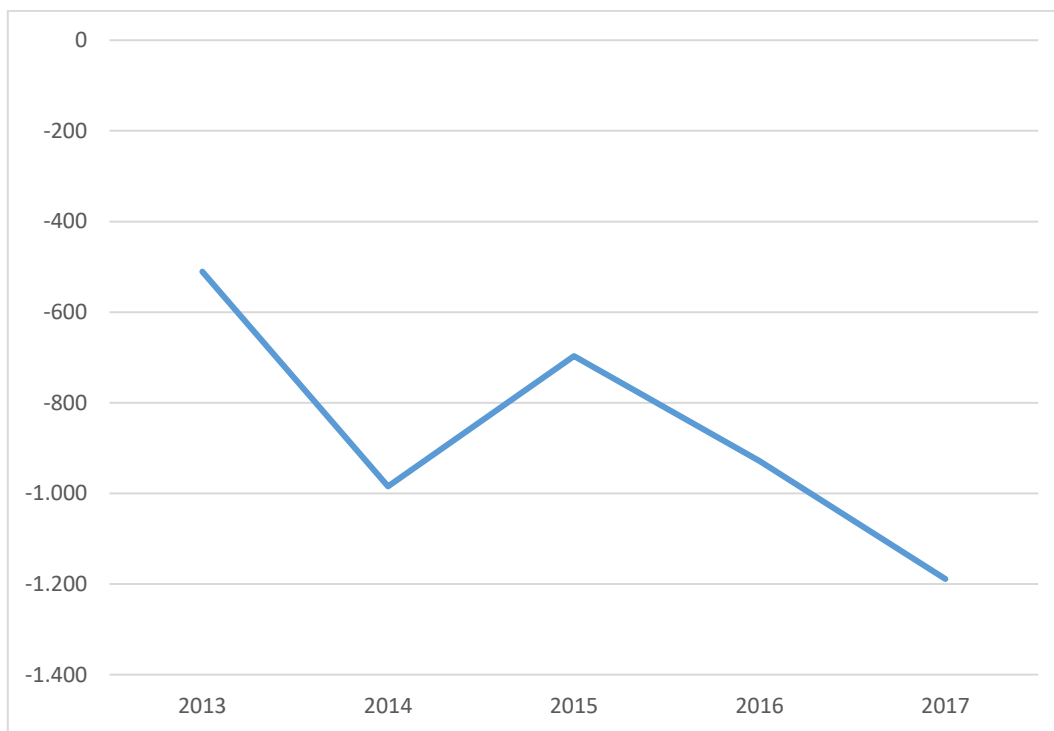


Diagram 2 represents the age distribution of residents in the AoE. The diagram is based on the data from all NUTS 3 regions in the AoE excluding West Bačka District due to unavailability of data.

More than half of the residents of the AoE (55,44 %) are aged 25-64 years. The residents aged 65 years and above are the second largest group representing 19,56% of all population. Residents aged 0-14 years represent 13,91% and residents aged 15-24 years 11,09% of all population of the AoE. Those percentages indicate the aging of population in the area.

Diagram 3: Average net migration plus statistical adjustment of NUTS 3 regions in the Amazon of Europe for the years 2013-2017 (-West Bačka District)



*The data of West Bačka District is excluded from the indicator due to unavailability.

Average net migration plus statistical adjustment of NUTS 3 regions in the Amazon of Europe is negative for the years 2013-2017 meaning that there were more emigrants than immigrants in the Amazon of Europe region during that period. The diagram shows the trend in emigration of residents in the region for those years (with the exception of the year 2015 when there is a great reduction in emigration in comparison to immigration).

In the year 2017 the NUTS 3 region with the highest value of the Net migration plus statistical adjustment indicator is Eastern Styria (362) and the region with the lowest value is Osijek-Baranja County (-5.460).

The NUTS 3 region with the highest value of the Crude rate of net migration plus statistical adjustment (per 1.000 inhabitants) indicator is Eastern Styria (1,4) and the regions with the lowest value are Virovitica-Podravina County (-20,6), followed by Osijek-Baranja County (-19,3).

The figure 9 (on the next page) shows the number of inhabitants and crude rate of net migration in the Amazon of Europe area by NUTS 3 regions for the year 2017.

Figure 9: Number of inhabitants and crude rate of net migration in the Amazon of Europe area by NUTS 3 regions for the year 2017

Population and crude rate of net migration in the Amazon of Europe area by NUTS 3 regions (2017)

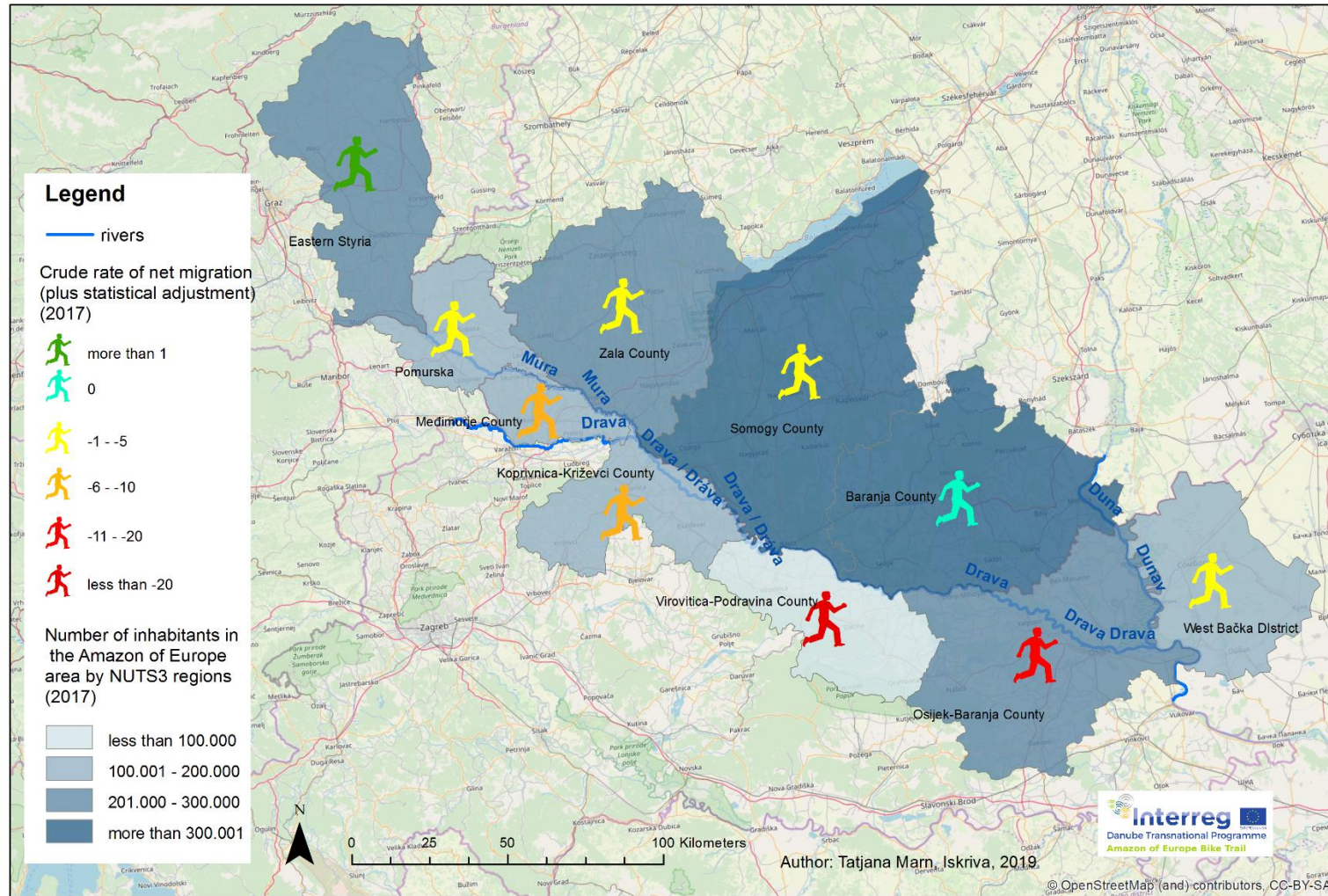
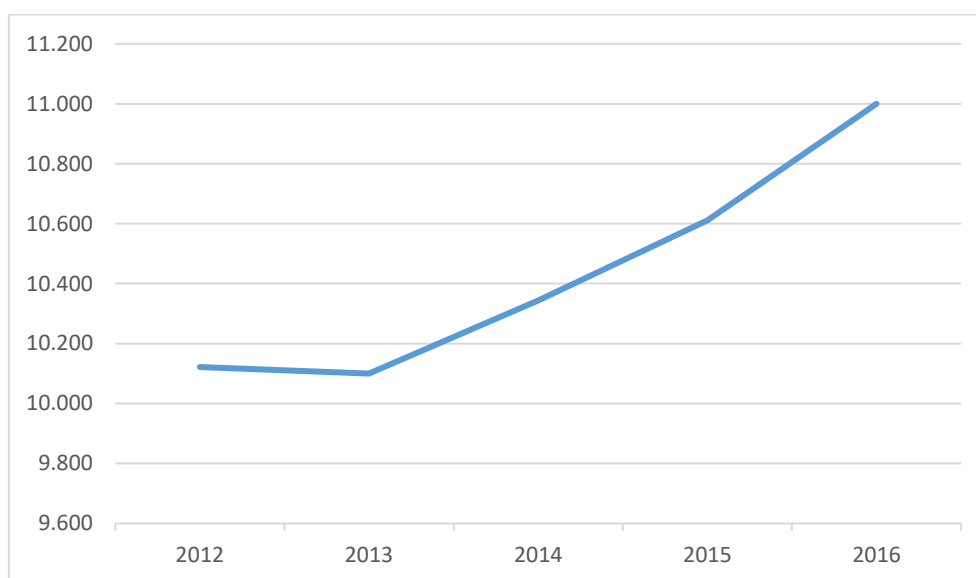


Table 7: GDP at current market prices (€/inhabitant) in the Amazon of Europe (-West Bačka District) for the years 2012-2016

GDP at current market prices (€/inhabitant)							
YEAR					AVERAGE GROWTH RATE		
2012	2013	2014	2015	2016	2012-2016	2014-2016	2015-2016
10.122	10.100	10.344	10.611	11.000	2,10%	3,12%	3,66%

Diagram 4: GDP at current market prices (€/inhabitant) in the Amazon of Europe area (-West Bačka District) for the years 2012-2016



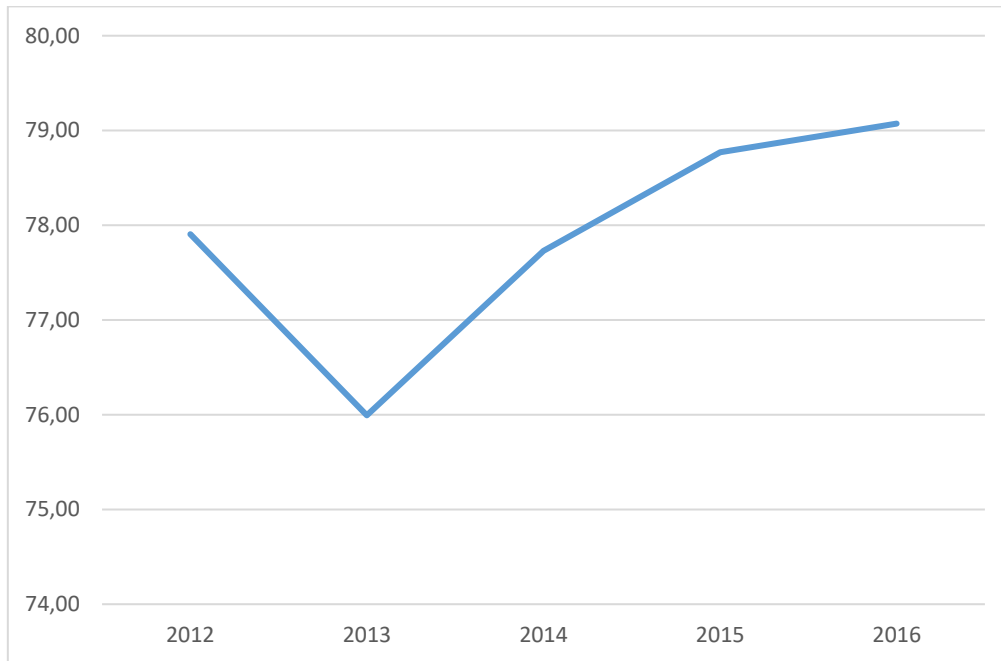
*The data for West Bačka District is not included in the analysis due to unavailability.

The Diagram 4 demonstrates that the values of the indicator GDP at current market prices (€/inhabitant) for the Amazon of Europe were growing significantly from the year 2012 to 2016. Average growth rate of the GDP at current market prices (€/inhabitant) for those years was 2,10%; even higher was for the years 2015-2016 (3,66%). In the year 2016 the value of the GDP at current market prices in the Amazon of Europe was 11.000 €/inhabitant. However, remarkable differences in GDP between the NUTS3 regions of the Amazon of Europe are noticeable. In the year 2016 the highest value of GDP was recorded in Eastern Styria (28.700 €/inhabitant) and the lowest in Virovitica-Podravina County (6.200 €/inhabitant). Based on the data for Vojvodina (NUTS2 region of West Bačka District) we estimate that the value of GDP in the year 2016 in West Bačka District might have been even lower (5.200 €/inhabitant). Apparent difference is visible also between the average GDP of NUTS 3 regions of the Amazon of Europe (10.420 €) and the average national GDP of countries partially included in the area (17.660 €). The data indicates that the regions of the Amazon of Europe are less economically developed than the national average.

Table 8: Employment (1000 persons) in the Amazon of Europe area (-West Bačka District) for the years 2012-2016

YEAR	2012	2013	2014	2015	2016
Employment (1000 persons)	10.122	10.100	10.344	10.611	11.000

Diagram 5: Employment (1000 persons) in the Amazon of Europe area (-West Bačka District) for the years 2012-2016



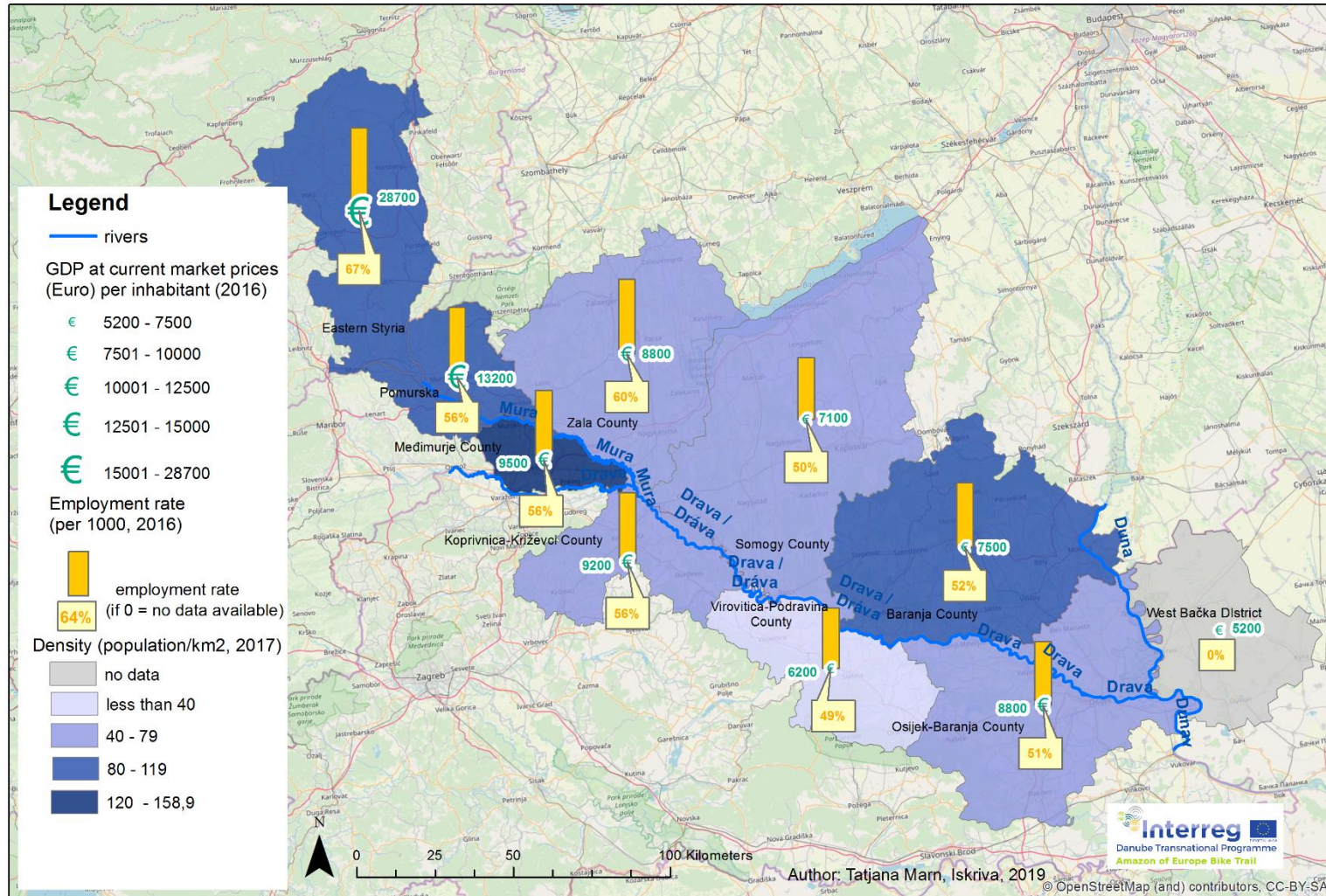
*The data of West Bačka District is excluded from the indicator due to unavailability.

The Diagram 5 demonstrates the growing trend of employment (1000 persons) in the years 2012-2016 in the Amazon of Europe area with an exception of the year 2013 when significant decline in employment was recorded. In the year 2016 there was 79.070 people employed in the Amazon of Europe. The employment rate for the area is 55,05% meaning that 55,05% of the available labour resources were being used. However, remarkable differences in employment between the NUTS 3 regions of the Amazon of Europe are noticeable. In the year 2016 the highest value of employment (1000 persons) was recorded in Baranya County (128,69) and the lowest in Virovitica-Podravina County (26,05). In the same year, the highest employment rate was recorded in Eastern Styria (67%) and the lowest in Virovitica-Podravina County (49%).

The figure 10 (on the next page) shows the population density, GDP at current market prices and employment rate in the Amazon of Europe area by NUTS 3 regions.

Figure 10: Density, GDP and employment rate in the Amazon of Europe area by NJTS 3 regions

Population density, GDP and employment rate in the Amazon of Europe area by NUTS 3 regions



The results of the analysis of socio-economic indicators have shown that the border regions of the Amazon of Europe area are significantly less developed than the national average in the fields of GDP and employment. Moreover, the trend of emigration of residents is evident in those regions as well. Since those regions represent 8,5% of national territories, it's even more important that measures in the field of investment and development are implemented there in the future. The aim of the Amazon of Europe Bike trail project is to contribute to the improvement of the economic situation in the area by developing and launching a new cycling tourism product the Amazon of Europe Bike Trail. This product will attract more visitors to the region and thus, stimulate the development of new touristic services that will create more jobs for local inhabitants. Most likely new businesses and jobs will positively affect the economic wealth of the region and decrease the phenomenon of emigration.

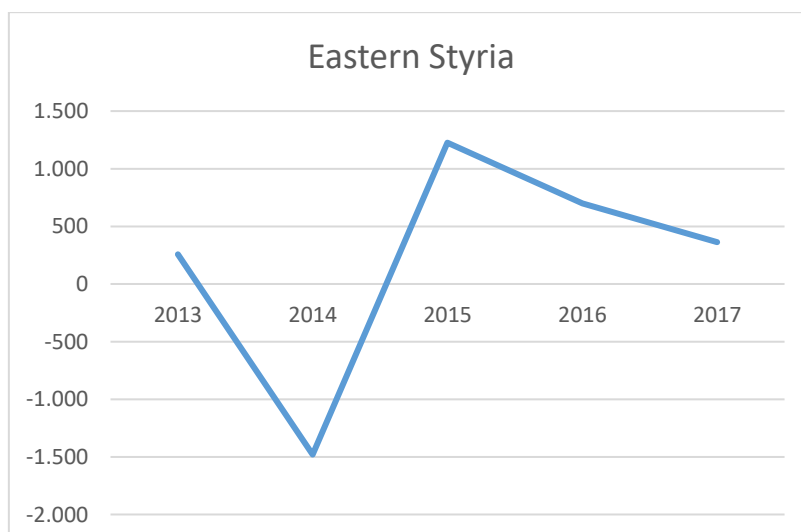
Socio-economic profiles of individual regions are presented more in details in the following subchapters.

3.1 Profile of Eastern Styria region

AT224 – EASTERN STYRIA – year 2017	
Total surface of the region	2.231,36 km ²
Number of inhabitants	266.343
% of inhabitants in the country	14,27%
Net migration plus statistical adjustment	362
Crude rate of net migration plus statistical adjustment (per 1.000 inhabitants)	1,4
GDP at current market prices per inhabitant for the year 2016*	28.700 €
National GDP at current market prices per inhabitant for Austria for the year 2016*	40.800 €
Employment (thousand persons) for the year 2016*	118,80
Employment rate for the year 2016*	66,83%

* the data for the year 2017 is not available

Diagram 6: Eastern Styria - Net migration plus statistical adjustment for the years 2013-2017



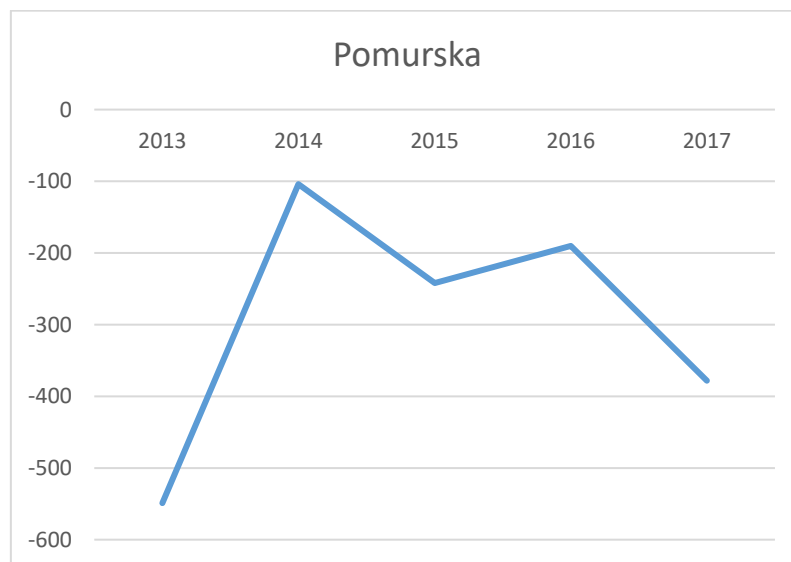
In Eastern Styria the indicator net migration plus statistical adjustment is positive for the years 2013-2017 (with the exception of the year 2014) meaning that there were more immigrants than emigrants in this region during that period. Nevertheless, the diagram shows the trend in emigration of residents in the region for those years (with the exception of the year 2015 when there is a great reduction in emigration in comparison to immigration).

3.2 Profile of Pomurska region

SI031 – POMURSKA – year 2017	
Total surface of the region	1.337,00 km ²
Number of inhabitants	115.477
% of inhabitants in the country	5,59%
Net migration plus statistical adjustment	-378
Crude rate of net migration plus statistical adjustment (per 1.000 inhabitants)	-3,3
GDP at current market prices per inhabitant for the year 2016*	13.200 €
National GDP at current market prices per inhabitant for Slovenia for the year 2016*	19.500 €
Employment (thousand persons) for the year 2016*	43,18
Employment rate for the year 2016*	55,60%

* the data for the year 2017 is not available

Diagram 7: Pomurska - Net migration plus statistical adjustment for the years 2013-2017



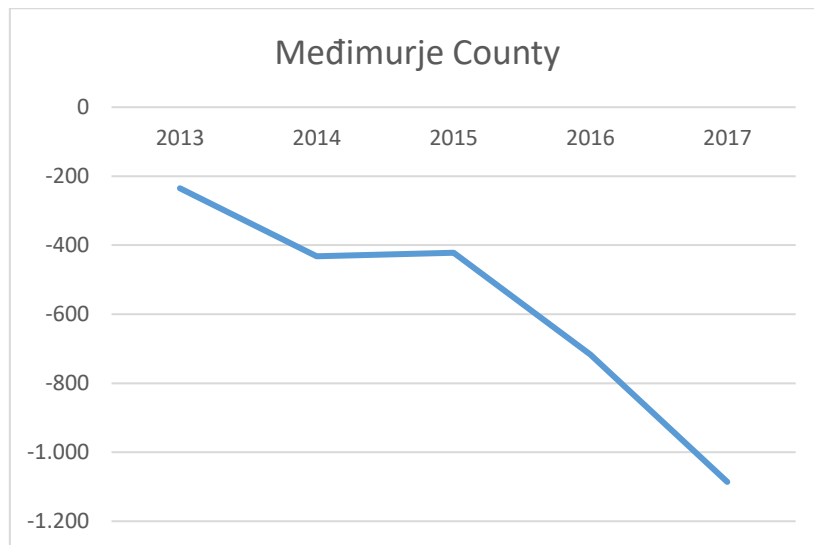
In Pomurska region the indicator net migration plus statistical adjustment is negative for the years 2013-2017 meaning that there were more emigrants than immigrants in this region during that period. Diagram shows a great reduction in emigration (in comparison to immigration) in the year 2014 but in the next years the number of emigrants starts increasing (with the exception of the year 2016 when it slightly decreases).

3.3 Profile of Međimurje County region

HR046 – MEĐIMURJE COUNTY – year 2017	
Total surface of the region	729,00 km ²
Number of inhabitants	111.669
% of inhabitants in the country	2,69%
Net migration plus statistical adjustment	-1.086
Crude rate of net migration plus statistical adjustment (per 1.000 inhabitants)	-9,8
GDP at current market prices per inhabitant for the year 2016*	9.500 €
National GDP at current market prices per inhabitant for Croatia for the year 2016*	11.200 €
Employment (thousand persons) for the year 2016*	41,63
Employment rate for the year 2016*	55,48%

* the data for the year 2017 is not available

Diagram 8: Međimurje County – Net migration plus statistical adjustment for the years 2013-2017



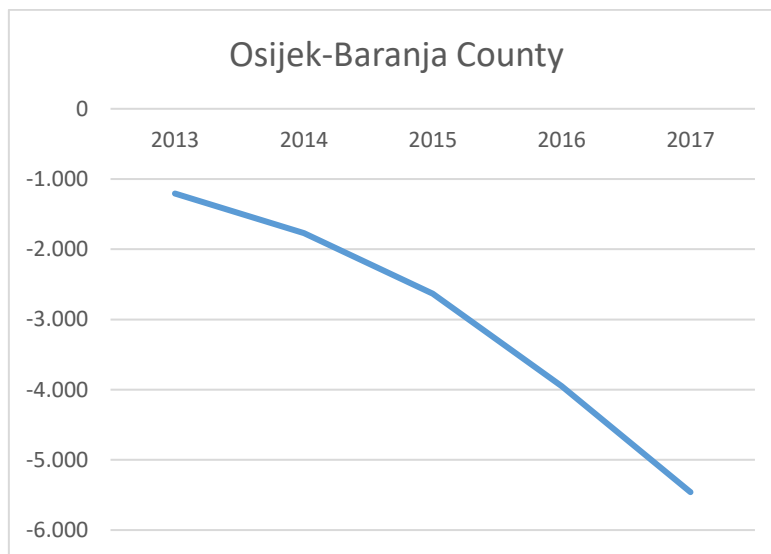
In Međimurje County the indicator net migration plus statistical adjustment is negative for the years 2013-2017 meaning that there were more emigrants than immigrants in this region during that period. Diagram shows the trend in emigration of residents in the region for those years (with the exception of the year 2015 when there is a slight reduction in emigration in comparison to immigration).

3.4 Profile of Osijek-Baranja County region

HR04B – OSIJEK-BARANJA COUNTY – year 2017	
Total surface of the region	4.155,00 km ²
Number of inhabitants	283.035
% of inhabitants in the country	6,86%
Net migration plus statistical adjustment	-5.460
Crude rate of net migration plus statistical adjustment (per 1.000 inhabitants)	-19,3
GDP at current market prices per inhabitant for the year 2016*	8.800 €
National GDP at current market prices per inhabitant for Croatia for the year 2016*	11.200 €
Employment (thousand persons) for the year 2016*	100,29
Employment rate for the year 2016*	51,16%

* the data for the year 2017 is not available

Diagram 9: Osijek-Baranja County – Net migration plus statistical adjustment for the years 2013-2017



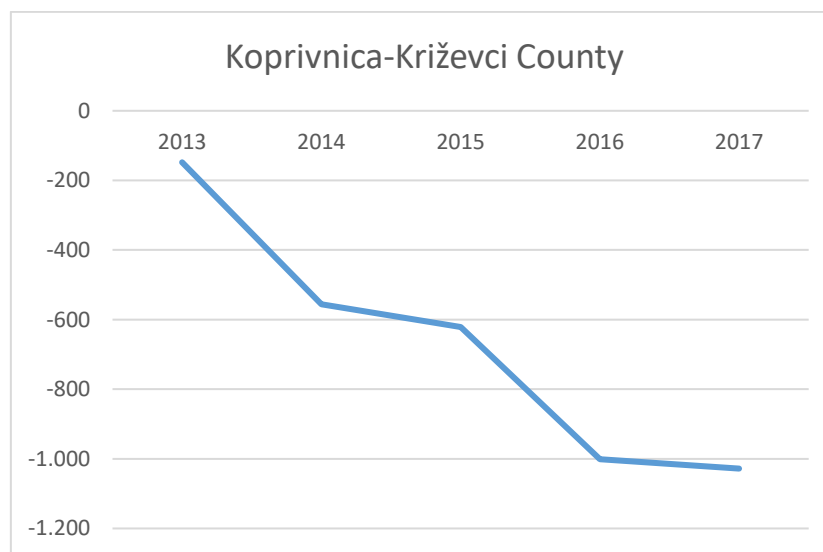
In Osijek-Baranja County the indicator net migration plus statistical adjustment is negative for the years 2013-2017 meaning that there were more emigrants than immigrants in this region during that period. Diagram shows the trend in emigration of residents in the region for those years.

3.5 Profile of Koprivnica-Križevci County region

HR045 – KOPRIVNICA-KRIŽEVCI COUNTY – year 2017	
Total surface of the region	1.748,00 km ²
Number of inhabitants	108.454
% of inhabitants in the country	2,61%
Net migration plus statistical adjustment	-1.028
Crude rate of net migration plus statistical adjustment (per 1.000 inhabitants)	-9,4
GDP at current market prices per inhabitant for the year 2016*	9.200 €
National GDP at current market prices per inhabitant for Croatia for the year 2016*	11.200 €
Employment (thousand persons) for the year 2016*	40,47
Employment rate for the year 2016*	55,72%

* the data for the year 2017 is not available

Diagram 10: Koprivnica-Križevci County – Net migration plus statistical adjustment for the years 2013-2017



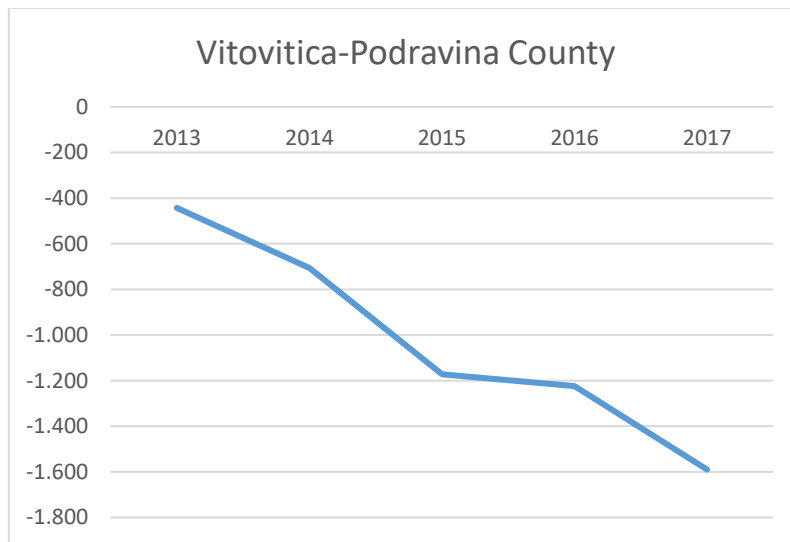
In Koprivnica-Križevci County the indicator net migration plus statistical adjustment is negative for the years 2013-2017 meaning that there were more emigrants than immigrants in this region during that period. Diagram shows the trend in emigration of residents in the region for those years.

3.6 Profile of Virovitica-Podravina County region

HR048 – VIROVITICA-PODRAVINA COUNTY – year 2017	
Total surface of the region	2.024,00 km ²
Number of inhabitants	79.111
% of inhabitants in the country	1,89%
Net migration plus statistical adjustment	-1.590
Crude rate of net migration plus statistical adjustment (per 1.000 inhabitants)	-20,6
GDP at current market prices per inhabitant for the year 2016*	6.200 €
National GDP at current market prices per inhabitant for Croatia for the year 2016*	11.200 €
Employment (thousand persons) for the year 2016*	26,05
Employment rate for the year 2016*	49,18%

* the data for the year 2017 is not available

Diagram 11: Virovitica-Podravina County - Net migration plus statistical adjustment for the years 2013-2017



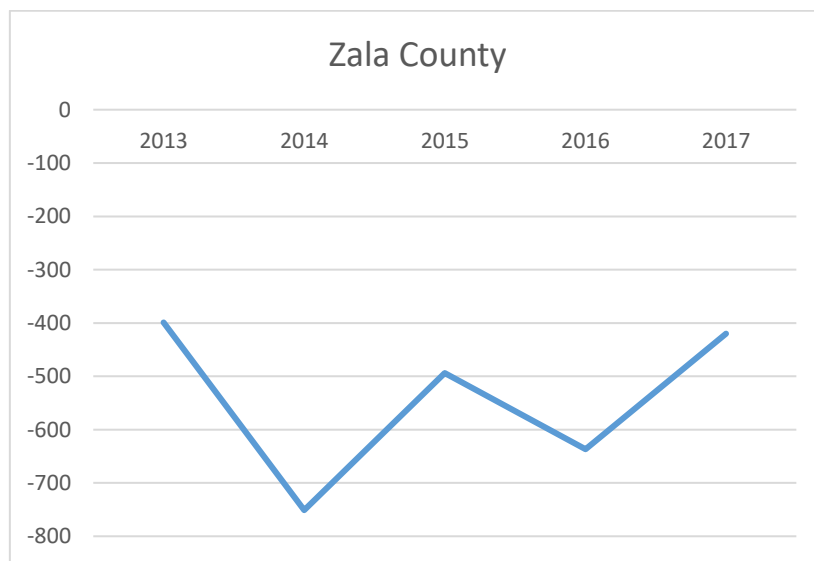
In Virovitica-Podravina County the indicator net migration plus statistical adjustment is negative for the years 2013-2017 meaning that there were more emigrants than immigrants in this region during that period. Diagram shows the trend in emigration of residents in the region for those years.

3.7 Profile of Zala County region

HU223 – ZALA COUNTY – year 2017	
Total surface of the region	3.784,84 km ²
Number of inhabitants	272.798
% of inhabitants in the country	2,78%
Net migration plus statistical adjustment	-420
Crude rate of net migration plus statistical adjustment (per 1.000 inhabitants)	-1,5
GDP at current market prices per inhabitant for the year 2016*	8.800 €
National GDP at current market prices per inhabitant for Hungary for the year 2016*	11.600 €
Employment (thousand persons) for the year 2016*	110,43
Employment rate for the year 2016*	59,83%

* the data for the year 2017 is not available

Diagram 12: Zala County – Net migration plus statistical adjustment for the years 2013-2017



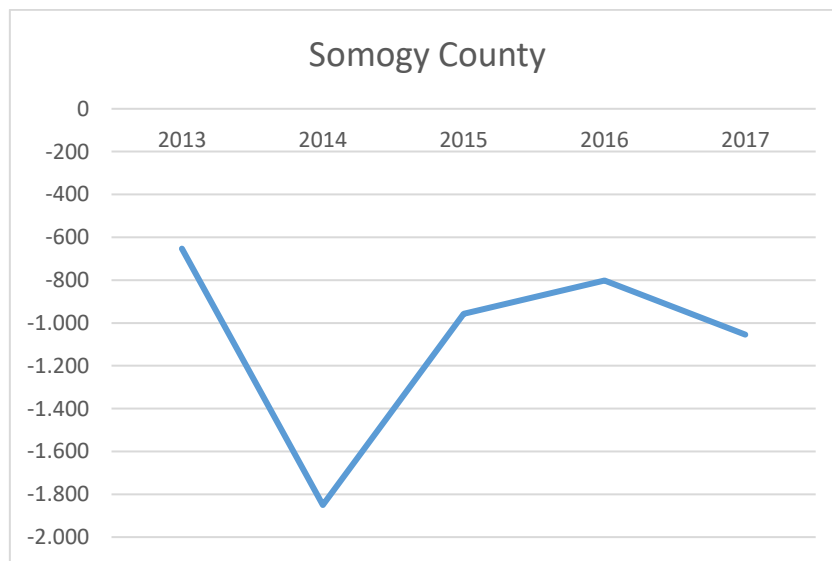
In Zala County the indicator net migration plus statistical adjustment is negative for the years 2013-2017 meaning that there were more emigrants than immigrants in this region during that period. Diagram doesn't show any trend in emigration or immigration of residents in the region for those years.

3.8 Profile of Somogy County region

HU232 – SOMOGY COUNTY – year 2017	
Total surface of the region	6.065,09 km ²
Number of inhabitants	306.698
% of inhabitants in the country	3,13%
Net migration plus statistical adjustment	-1.055
Crude rate of net migration plus statistical adjustment (per 1.000 inhabitants)	-3,5
GDP at current market prices per inhabitant for the year 2016*	7.100 €
National GDP at current market prices per inhabitant for Hungary for the year 2016*	11.600 €
Employment (thousand persons) for the year 2016*	102,11
Employment rate for the year 2016*	49,49%

* the data for the year 2017 is not available

Diagram 13: Somogy County – Net migration plus statistical adjustment for the years 2013-2017



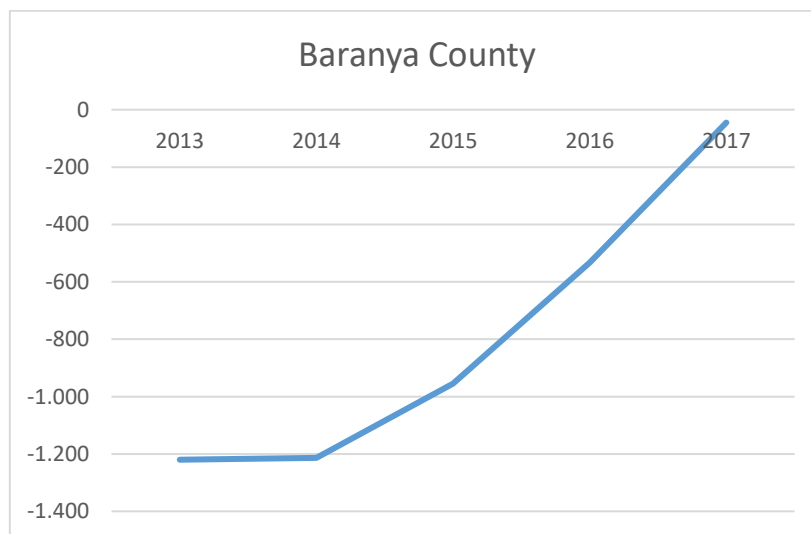
In Somogy County the indicator net migration plus statistical adjustment is negative for the years 2013-2017 meaning that there were more emigrants than immigrants in this region during that period. Diagram shows a great increase in emigration (in comparison to immigration) in the year 2014. The next two years the number of emigrants is decreasing but it slightly increases again in the year 2017.

3.9 Profile of Baranya County region

HU231 – BARANYA COUNTY – year 2017	
Total surface of the region	4.429,60 km ²
Number of inhabitants	365.726
% of inhabitants in the country	3,73%
Net migration plus statistical adjustment	-45
Crude rate of net migration plus statistical adjustment (per 1.000 inhabitants)	-0,1
GDP at current market prices per inhabitant for the year 2016*	7.500 €
National GDP at current market prices per inhabitant for Hungary for the year 2016*	11.600 €
Employment (thousand persons) for the year 2016*	128,69
Employment rate for the year 2016*	52,13%

* the data for the year 2017 is not available

Diagram 14: Baranya County – Net migration plus statistical adjustment for the years 2013-2017



In Baranya County the indicator net migration plus statistical adjustment is negative for the years 2013-2017 meaning that there were more emigrants than immigrants in this region during that period. Diagram shows the trend in immigration of residents in the region for those years.

3.10 Profile of West Bačka District region

RS121 – WEST BAČKA DISTRICT – year 2017	
Total surface of the region	2.420,00 km ²
Number of inhabitants	175.347
% of inhabitants in the country	2,50%
Net migration plus statistical adjustment	-454
Crude rate of net migration plus statistical adjustment (per 1.000 inhabitants)	-2,6
GDP at current market prices per inhabitant for the year 2016*	5.200 €
National GDP at current market prices per inhabitant for Serbia for the year 2016*	5.200 €
Employment (thousand persons) for the year 2016	n/a
Employment rate for the year 2016*	n/a

* the data for the year 2017 is not available; the data for the whole Vojvodina region – the data only for West Bačka District is not available

The data for »employment (thousand persons)« and »employment rate« were not available for the West Bačka District.

4 Tourism indicators

This chapter provides information of a current state of tourism development in the Amazon of Europe area by comparing the key tourism indicators tourist arrivals and overnight stays. Data in this chapter is collected on NUTS 3 level if not stated differently in specific subcategory. Data for the years 2000, 2010, 2015, 2016 and 2017 is collected on annual basis and additionally on monthly basis for the years 2015, 2016 and 2017.

For the analysis secondary data from already existing databases on regional, national and European level is used. Sources of data: regional, national and Eurostat statistics.

4.1 Number of overnight stays and tourist arrivals in the Amazon of Europe


TOURIST ARRIVALS		OVERNIGHT STAYS	
	Year 2017: cca. 3,2 mio AGR (2015-2017): 4,5%		Year 2017: cca. 9,7 mio AGR (2015-2017): 4,2%

Table 9: Tourist arrivals and overnight stays in the Amazon of Europe for the years 2010, 2015, 2016 and 2017

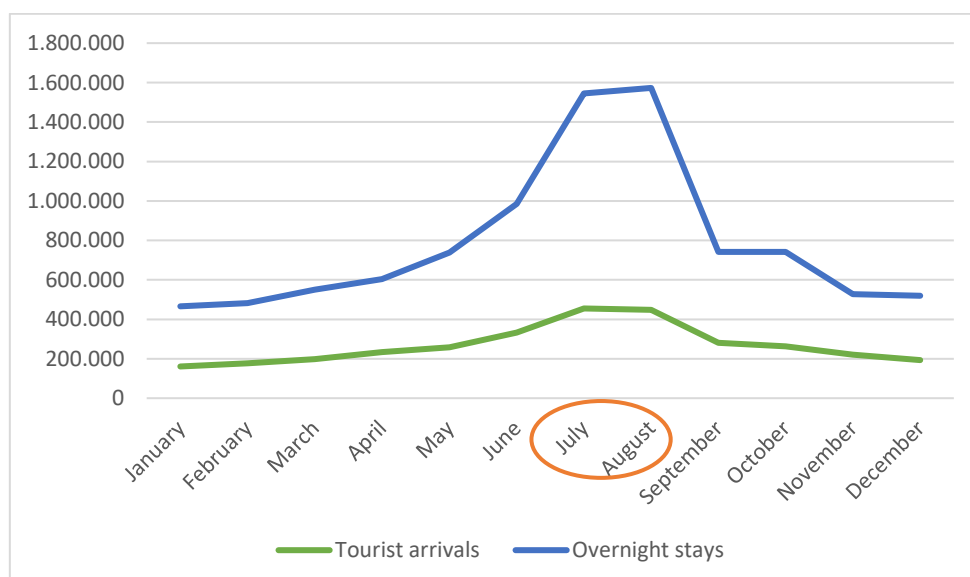
	YEAR				AVERAGE GROWTH RATE		
	2010	2015	2016	2017	2010-2017	2015-2017	2016 vs 2017
Tourist arrivals	2.440.828	2.948.408	3.136.454	3.219.673	4,0%	4,5%	2,7%
Overnight stays	7.853.914	8.924.778	9.497.784	9.697.790	3,1%	4,2%	2,1%

The table shows that the number of tourist arrivals and overnight stays was growing from the years 2010 to 2017 which indicates touristic potential of the region. The region with the most tourist arrivals and overnight stays is Eastern Styria and the region with the least is West Bačka District. Despite these promising results, the Amazon of Europe area is currently still touristically underdeveloped and many efforts from local actors and organizations will be needed in order to make it a successful tourism destination. However, due to increasing trend in tourist arrivals and overnight stays the time for entering tourism market with a new tourism product developed by the Amazon if Europe Bike partnership is good. Long-distance cycling and responsible holidays are growing popularity lately, thus, we expect the number of visitors will further increase after a new cycling product will be launched. With more and more people coming to the area, we expect it will gain visibility in Europe and in the World and through time become a popular sustainable tourism destination.

Diagram 15: Tourist arrivals and overnight stays in the Amazon of Europe on NUTS3 level for the years 2010, 2015, 2016 and 2017 – annual



Diagram 16: Overnight stays and arrivals in the Amazon of Europe on NUTS3 level in 2017 – monthly



The highest numbers of tourist arrivals and overnight stays in the Amazon of Europe are in June and July indicating strong seasonal pattern in summer that is as well a peak season for cycling tourism. Since the weather conditions in the area are suitable for cycling also in spring and autumn months those findings represent a great opportunity for the extension of touristic season by offering a new bookable biking product.

5 Tourism supply/pull-factors

Pull factors are destination generated forces and the knowledge that tourists hold about a destination. Tourism supply has to do with the provision of the key elements of the tourism industry by the host destination to attract tourists. This chapter provides an overview of destination features and existing tourism resources important for the development of cycling tourism in the Amazon of Europe area.

5.1 Accessibility

This chapter provides information about accessibility of cycling route in all regions by different means of transportation and explains border policies and potential issues visitors might encounter while trying to reach the destination and using the bike trail.

The Amazon of Europe Bike Trail area is quite well connected with public transport, while much improvement is needed for specialized biking shuttle services. In the table below accessibility of the Amazon of Europe Bike Trail is presented on a level of the whole Amazon of Europe region.

ACCESSIBILITY OF THE AMAZON OF EUROPE	
BY AIR	Main airports: Graz Airport (AT), Zagreb Airport (HR), Osijek Airport Klisa (HR), Budapest Airport (HU), Hévíz-Balaton international airport (HU)
BY BUS	Good connections to bigger cities or towns in the region such as Murska Sobota, Lendava, Čakovec, Koprivnica, Đurđevac, Virovitica, Osijek, Zalaegerszeg, Nagykanizsa, Pécs, Sombor, Apatin. From bigger cities there are local buses to smaller towns and villages near the cycling route.
BY TRAIN	Main train stations in the region are Bad Radkersburg, Mureck, Murska Sobota, Lendava, Čakovec, Koprivnica, Đurđevac, Virovitica, Osijek, Zalaegerszeg, Nagykanizsa, Gyékényes, Csurgó, Pécs, Barcs, Mohács, Villány, Sombor, Bogojevo.
SHUTTLE SERVICES	Airport shuttle services, local shuttle services and taxi.
BORDER POLICIES AND POTENTIAL ISSUES	Austria, Slovenia and Hungary are within the EU Schengen area and therefore there are generally no controls on the borders between the countries. Due to current migrant situation there might be border controls from time to time so carrying ID or passport is obligatory. Croatia is not within the Schengen area so in order to pass the border with Hungary and Slovenia ID or passport is needed, the same applies for the border with Serbia. Moreover, usually there are stricter controls on the Schengen borders for non-EU citizens.

Accessibility of cycling route by regions of the Amazon of Europe is presented more in detail in the following tables.

Accessibility of Eastern Styria	
BY AIR	Nearest airport: Graz Airport (AT) – distance 80 km. Connections mainly to Germany (Stuttgart, Frankfurt, Berlin), Switzerland (Zurich) and Vienna. If you travel by plane, you need to take a shuttle service or train from the airport to Bad Radkersburg.
BY BUS	Bus connection from Graz but at irregular times.
BY TRAIN	Train station in Bad Radkersburg (with some trains you have to change tracks in Spielfeld). Train station in Mureck – starting point of the AoE Bike Trail.
SHUTTLE SERVICES	Shuttle service Thermenland Shuttle is offered by Krenn Reisen, a local travel agency. It must be booked in advance online or via phone. https://krenn.reisen/thermenland-shuttle/buchen/
BORDER POLICIES AND POTENTIAL ISSUES	Schengen border to Slovenia. Because of the current migrant situation there might be border controls and therefore you need an ID or passport to cross.

Accessibility of Pomurska	
BY AIR	Nearest airports: Maribor (SI) - 80 km (no regular lines), Graz Airport (AT) - distance 120 km, Zagreb Airport (HR) - distance 150 km, Jože Pučnik Airport Ljubljana (SI) - distance 200 km, Klagenfurt Airport (AT) - distance 200 km. Other airports: Vienna Airport (AT) - distance 240 km, Budapest Airport (HU) - distance 300 km.
BY BUS	Possibility of urban, long-distance and international bus transport. There are good bus connections between the bigger cities in Pomurje, while to smaller towns there are connections mostly once a day. Detailed information on bus and coach transport can be found at the main bus stops and their web pages: e.g. Bus Station Murska Sobota: www.apms.si , (local lines and lines between Pomurje and other Slovenian regions). Timetables and information about bus connections within Slovenia and to foreign countries can be found on https://www.ap-ljubljana.si/ .
BY TRAIN	The Railway network is well branched and easily leads you to major cities and towns. Due to the extended railway network and short distances, it is also recommended to travel the surrounding area by train. All information on the railway network can be found on the web site www.slo-zeleznice.si . Information about the main railway stations in the region: Murska Sobota Railway Station: +386 (0) 2 292 48 22.
SHUTTLE SERVICES	Shuttle service GoOpti Airport Transfer offers various types of transport, including low-cost group transfers to airports and cities, private transport for business users and customized services organized according to wishes and needs. More information about this shuttle service can be found at the web site www.goopti.si . Shuttle service iGOLine also offers three options for booking: low cost transport to airports and cities, customized user transport and transport for business users and more demanding costumers. ŠTRK Slovenia offers shuttle service by bus from airports and different locations to Velika Polana, Pomurje Region.
BORDER POLICIES	Slovenia is in the Schengen area, which means that at the border crossings with Italy, Austria and Hungary, as a rule, there are no controls. In order to enter Slovenia from

AND POTENTIAL ISSUES	Croatia, a passport or a personal document is sufficient, if the visit does not last more than three months. Free movement of goods is in the European Union countries, which means that you can bring with you any items for personal use with you. There are tougher restrictions for non-EU citizens.
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Accessibility of Međimurje County	
BY AIR	Nearest airport: Zagreb Airport (HR) - distance 100 km.
BY BUS	Public bus transportation provided at every stop (village, city) across the cycling route. Info about the bus transportation can be found on the website: http://www.buscroatia.com
BY TRAIN	The most significant railway junction in Međimurje is the Railway Station Čakovec (border crossing and customs), 1 km from the town centre. The local railway stations include: Mursko Središće, Vratišinec, Krištanovec, Novo Selo Rok, Macinec, Dunjkovec, Buzovec, Mala Subotica, Čehovec, Donji Kraljevec, Donji Mihaljevec and Kotoriba (border crossing and customs). More information about the timetable is available at the website: http://vred.hznet.hr/hzinfo/?category=hzinfo&service=vred3
SHUTTLE SERVICES	/
BORDER POLICIES AND POTENTIAL ISSUES	Croatia is still not within the EU Schengen area, so in order to pass the border with Hungary and Slovenia ID or passport is needed.

Accessibility of Osijek-Baranja County	
BY AIR	Nearest airport: Osijek Airport Klisa (HR) - distance 50 km. Lines to Zagreb, Rijeka, Dubrovnik, Split, Pula, Basel, Stuttgart, Koln (Bonn). All of the lines are seasonal and available at the official webpage: http://www.osijek-airport.hr/
BY BUS	Central bus station in Osijek: Main bus station for the international and domestic arrivals. There are year-round lines to the cities within the region: Đakovo, Slavonski Brod, Požega, Gradiška and cities within the country: Pula, Rijeka, Umag, Poreč, Rovinj, Zagreb, Karlovac, Zadar, Split, Šibenik, Trogir. There are international direct lines to Germany (Munich, Stuttgart, Koln, Dusseldorf, Dortmund), Switzerland (Basel, Luzern) and Serbia (Novi Sad, Beograd) as well. There are also regional and local lines to the places around the county. Official webpage: https://www.arriva.com.hr/hr-hr/naslovna Other cities: Beli Manastir, Valpovo, Belišće, Donji Miholjac, Erdut, Dalj.
BY TRAIN	Osijek train station: There are year-round lines to cities within the region (Đakovo, Vinkovci, Slavonski Brod, Beli Manastir) and to Zagreb. Other cities: Beli Manastir, Dalj - lines connecting with Osijek.
SHUTTLE SERVICES	/
BORDER POLICIES AND POTENTIAL ISSUES	Croatia is still not within the Schengen area, so in order to pass the border with Hungary, Slovenia and Serbia ID or passport is needed. There is a possibility of detailed border control on the border with Serbia that is not a member of EU.

Accessibility of Koprivnica-Križevci County	
BY AIR	<p>Nearest airports: Zagreb Airport (HR) - distance 100 km, Osijek Airport Klisa (HR) - distance 200 km.</p> <p>Other airports: Budapest Airport (HU) - distance 300 km, Graz Airport (AT) - distance 200 km, Maribor Airport (SI) - distance 110 km (no regular lines).</p>
BY BUS	<p>Bus stations: Koprivnica, Đurđevac.</p> <p>Operators: Čazmatrans, AP Varaždin Đurđevac.</p>
BY TRAIN	<p>Koprivnica train station - train lines: Budapest - Koprivnica - Zagreb; Osijek - Đurđevac - Koprivnica – Varaždin.</p> <p>Operator: Croatian railways.</p>
SHUTTLE SERVICES	Airport shuttle; taxi Cammeo; taxi Sunce.
BORDER POLICIES AND POTENTIAL ISSUES	Police border station Koprivnica; Border crossings Gola (road) and Botovo (railway). ID or passport needed.

Accessibility of Virovitica-Podravina County	
BY AIR	<p>Nearest airports: Zagreb Airport (HR) - distance 190 km, Budapest Airport (HU) - distance 320 km.</p>
BY BUS	<p>Bus stations: The nearest bus station is situated in the city of Virovitica, 15 km away from the cycling route.</p> <p>6 arrivals from Zagreb and 6 departures to Zagreb on a daily basis; 2 direct weekly bus routes to Zurich, Vienna and to dozen cities in Germany.</p>
BY TRAIN	<p>Train station: The nearest train station is situated in the city of Virovitica, 15 km away from the cycling route.</p> <p>4 arrivals from Zagreb and 4 departures to Zagreb on a daily basis.</p>
SHUTTLE SERVICES	/
BORDER POLICIES AND POTENTIAL ISSUES	Non-Schengen border with Hungary (passport or ID card required).

Accessibility of Zala County	
BY AIR	<p>Nearest airport: Hévíz-Balaton international airport at Sármellék (HU) - distance 66 km from Letenye, Hungarian-Croatian border crossing.</p> <p>In 2018 the airport had one regular airline to Frankfurt once a week until 20th October. The rest are charter flights.</p>
BY BUS	All settlements are accessible by scheduled bus services; however, the connections may be rare in small settlements at weekends. Carrying bicycle is not allowed on scheduled buses.
BY TRAIN	Zalaegerszeg train station: located on the international railway line Budapest - Ljubljana. There is one train daily from Ljubljana and three from Hodoš (border crossing with Slovenia). There are also 7 direct trains from Budapest per day. Bicycle carriage might be possible on these trains.

	Nagykanizsa train station: located on the international railway line Budapest-Zagreb, with two direct trains from Zagreb and 7 trains a day from Budapest. Bicycle carriage might be possible on these trains.
SHUTTLE SERVICES	/
BORDER POLICIES AND POTENTIAL ISSUES	Two border crossings Hungary-Croatia at Letenye-Goričan, on public road (7, D3) and motorway (M7, A4). Crossings are open to all citizens.

Accessibility of Somogy County	
BY AIR	Nearest airports: Hévíz-Balaton international airport (HU) – distance 90 km, Budapest Airport (HU) – distance 260 km.
BY BUS	All settlements are accessibly by scheduled bus services; however, the connections may be rare in small settlements at weekends. Carrying bicycle is not allowed on scheduled buses.
BY TRAIN	The border crossing settlement Zákány/Gyékényes is located on the international railway line Budapest-Zagreb, with two direct trains from Zagreb. Gyékényes and Csurgó have 3 daily connections from Budapest and several further with transfers. Bicycle carriage might be possible on these trains. The settlements between Nagykanizsa and Barcs are located on the railway line Pécs-Nagykanizsa-Sopron. These localities have 3 connections to Pécs a day, 2 to Szombathely and 1 to Sopron. Bicycle carriage is possible.
SHUTTLE SERVICES	/
BORDER POLICIES AND POTENTIAL ISSUES	Border crossings Hungary-Croatia at Berzence-Gola (681-D41, Barcs-Terezino Polje (6-D5). Crossings are open to all citizens.

Accessibility of Baranya County	
BY AIR	Nearest airports: Osijek Airport Klisa (HR) - distance 100 km, Budapest Airport (HU) – distance 250 km, Belgrade Nikola Tesla Airport (SR) - distance 300 km.
BY BUS	All settlements are accessibly by scheduled bus services, however the connections may be rare in small settlements at weekends. Carrying bicycle is not allowed on scheduled buses.
BY TRAIN	There is one direct train a day from Budapest to Pécs and 16 further trains from Szászhalombatta (direct shuttle bus from Budapest Kelenföld railway station). This option will be replaced by direct trains from autumn 2019 onwards. Carriage of bicycles is not possible on these trains at the moment. There are 3 trains a day from Pécs to Mohács, with a rapid transfer in Villány. Villány is accessible from Pécs by 11 trains a day. Pécs is accessible from Sopron (1 train), Szombathely (2 trains) and Nagykanizsa (3 trains) as well. Bicycle carriage is possible on these trains.
SHUTTLE SERVICES	There are shuttle services from all nearby airports (Budapest, Vienna, Zagreb, Belgrade, Hévíz-Balaton) to Pécs and the wider area. Carriage of bicycles is not possible on these services.

BORDER POLICIES AND POTENTIAL ISSUES	Border crossings Hungary-Croatia at Drávaszabolcs-Donji Miholjac (58-D53), Beremend-Baranjsko Petrovo Selo (5708-D211), Udvar-Duboševica (56-D7). Crossings are open to all citizens.
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Accessibility of West Bačka Distict	
BY AIR	Nearest airports: Osijek Airport Klisa (HR) - distance 30 km from the route, Belgrade Nikola Tesla Airport (SR) - distance 160 km.
BY BUS	Bus station: 5 km from the route there is a bus station of the local transport companies Apatin-trans and Sever-trans.
BY TRAIN	Train station: 10-15 km from the AoE bike route there is a railway station in the villages Sonta (Municipality of Apatin) and Bogojevo (Municipality Odžaci). Stations are located on the magistral railway line (E-71, Subotica (Serbia) - Sombor (Serbia) – Bogojevo (Serbia) - state border - Erdut (Croatia), and are connected with neighbouring Croatia.
SHUTTLE SERVICES	In the area there are registered taxi drivers for transport of goods and passengers. There is also the possibility of renting a van for transportation in Apatin and Sombor.
BORDER POLICIES AND POTENTIAL ISSUES	Apatin has a direct exit to the Danube River. There is a state border crossing for floating-sailing objects (foreign and domestic) of the riverbank area of the Danube River - left coast from 1418 to 1433 km. Apatin Harbor Office-Port Authority, refers to the branch unit and municipalities Sombor and Kula, headquartered in Bezdán, for the border crossing area in Bezdán and the area of the river Danube. The national border crossing for floating-sailing objects foreign and domestic flags Captain's Port of Apatin operates 24 hours continuously. There are no specific problems at the border crossing Bogojevo (Serbia) - Erdut (Croatia), except of possible queues due to heavy traffic.

The findings show that despite relatively good connections with public transport in larger cities, some rural areas are still quite hard to reach. There is especially a lack of cycling related transport services such as trains and busses allowing transport of bicycles, luggage transport services, shuttle services, etc. Further efforts will be needed to convince local authorities to improve public transit service quality and to promote the emergence of new cycling related transport services among local stakeholders. Moreover, the cooperation and collaboration between public and private sector will be of key importance when dealing with that issue.

5.2 Infrastructure

This chapter provides an overview of tourist and cycling infrastructure near the Amazon of Europe cycling route.

Data is collected for the area up to 10 km away from the cycling route/rivers, except of the data about tour operators/travel agencies that is collected on NUTS 3 level.

5.2.1 Accommodation



Available accommodations: 548



Available beds: 15.907

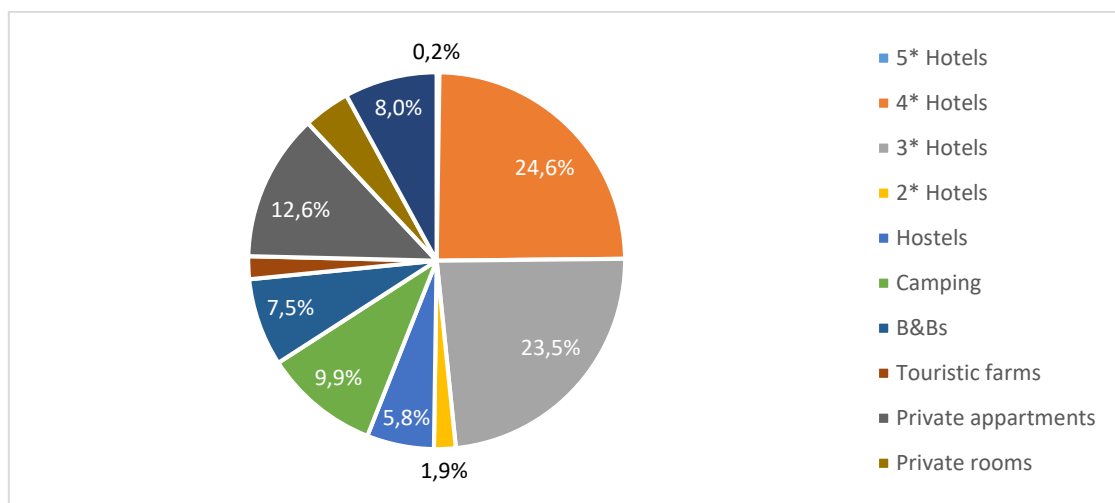
In the Amazon of Europe, the highest number of available beds is in 4* hotels, followed by 3* hotels, private apartments and campsites and the lowest number of available beds is in 5* hotel, followed by 2* hotels and touristic farms.

The region with the highest number of available beds is Baranya County (3.547) and the region with the lowest number of available beds is Koprivnica-Križevci County (510), followed by Virovitica-Podravina County (584).

Tabela 1: Number of accommodations and available beds in the Amazon of Europe area (up to 10 km from the cycling route/river)

TYPE OF ACCOMMODATION	NUMBER OF ACCOMMODATIONS	NUMBER OF BEDS
5* Hotels	1	38
4* Hotels	34	3.913
3* Hotels	56	3.743
2* Hotels	4	296
Hostels	19	917
Camping	17	1.573
B&Bs	98	1.200
Touristic farms	26	311
Private apartments	174	2.011
Private rooms	70	640
Other	49	1.265
TOTAL	548	15.907

Diagram 17: Share of available beds by type of the accommodation in the Amazon of Europe area (up to 10 km from the cycling route/river)



Accommodation data by regions is graphically presented in detail in the Diagrams 18, 19 and in the Figures 11, 12 on the following pages.

Diagram 18: Number of accommodations in the Amazon of Europe area (up to 10 km from the cycling route/river) by regions

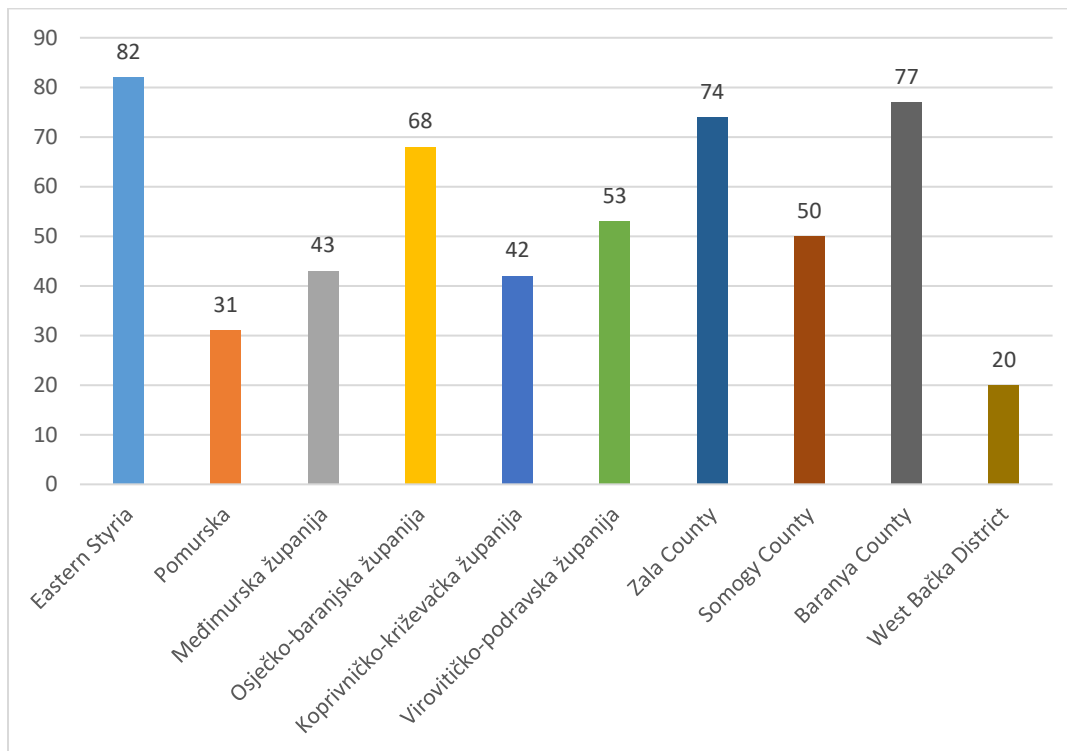


Diagram 19: Numer of available beds in the Amazon of Europe area (up to 10 km from the cycling route/river) by regions

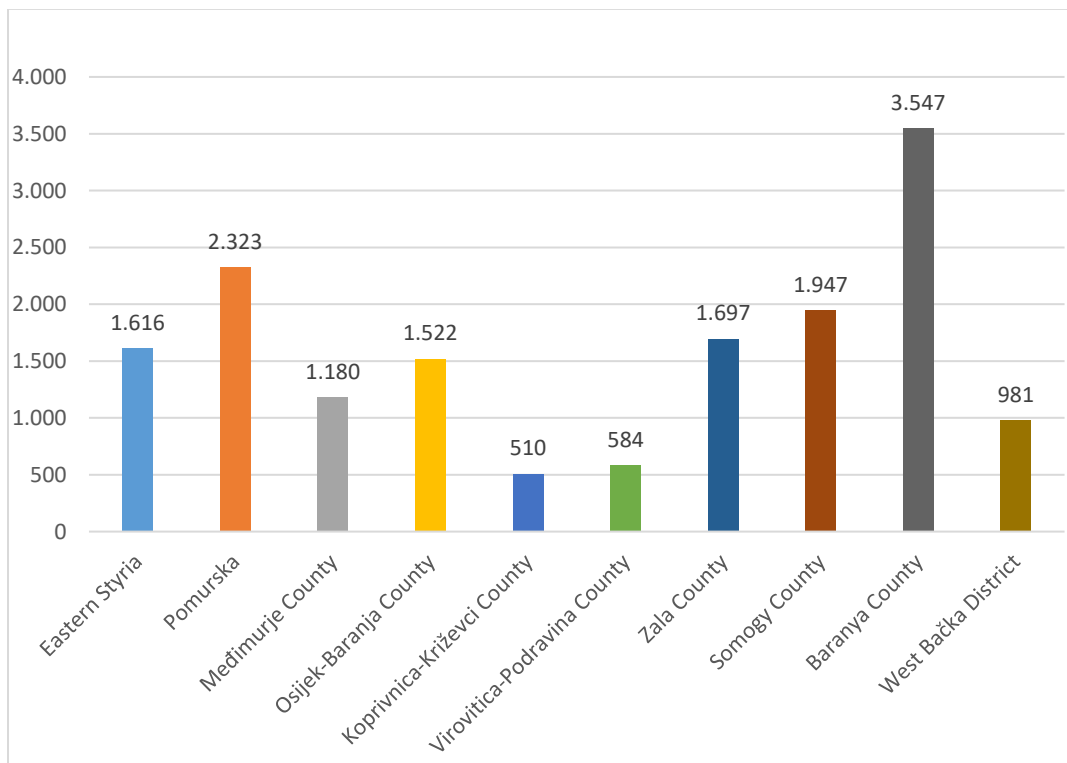


Figure 11: Categories of accommodations in the Amazon of Europe area (up to 10 km from the cycling route/river) by regions

Accommodations in the Amazon of Europe area (up to 10 km from the cycling route/river) by regions

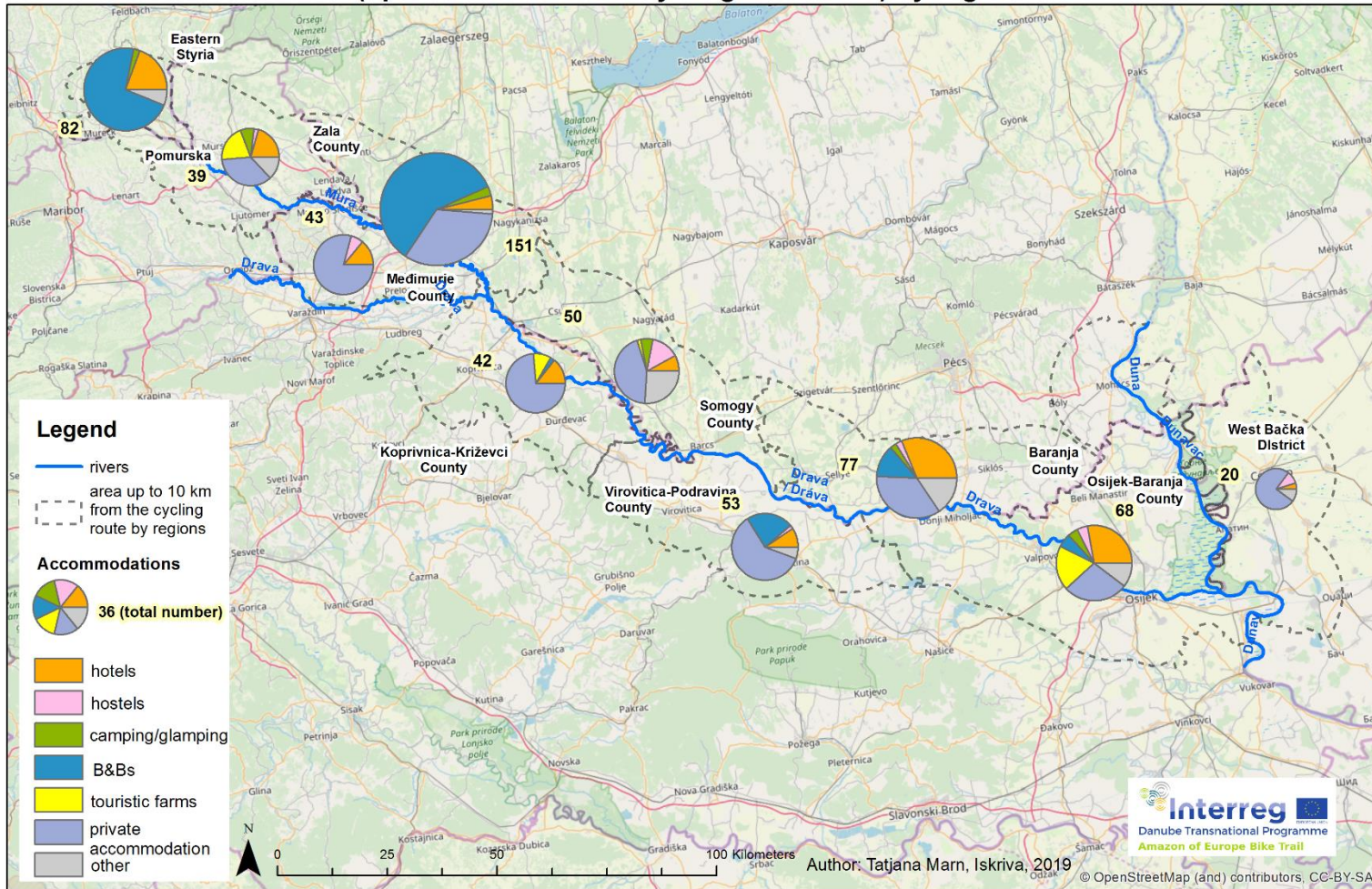
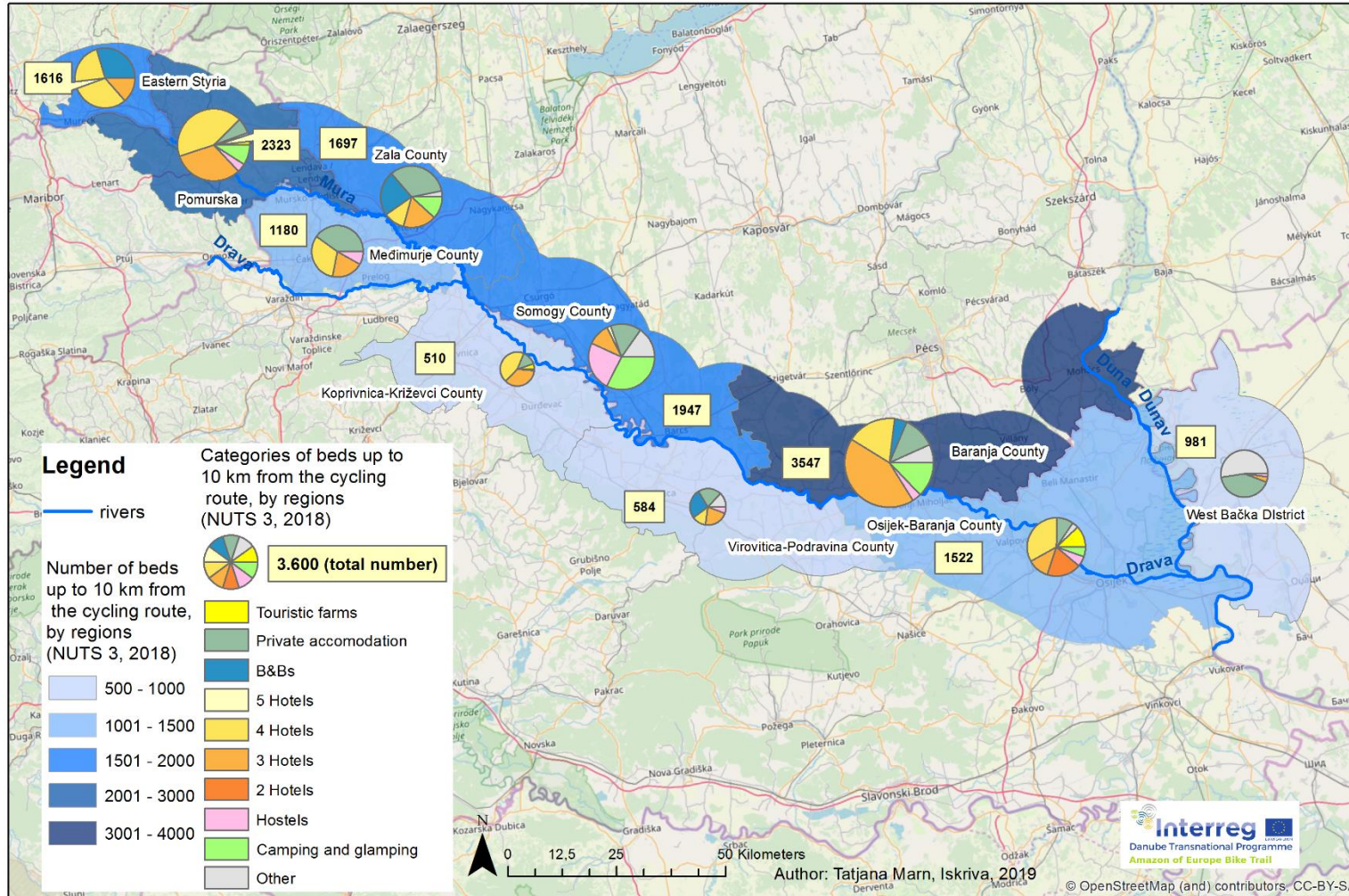


Figure 12: Number and categories of beds in the Amazon of Europe area (up to 10 km from the cycling route/river) by regions

Number and categories of beds in the Amazon of Europe area (up to 10 km from the cycling route/river) by regions



5.2.2 Restaurants



Restaurants: 362

In the Amazon of Europe in the zone up to 10 km away from the river/cycling route there are 362 restaurants altogether. The highest number of restaurants (104) is in Osijek-Baranja County and the lowest number of restaurants (8) is in Virovitica-Podravina County and West Bačka District. A common problem of all Amazon of Europe regions is that restaurants are mainly available only in larger places such as cities and towns and not in the rural parts near the rivers.

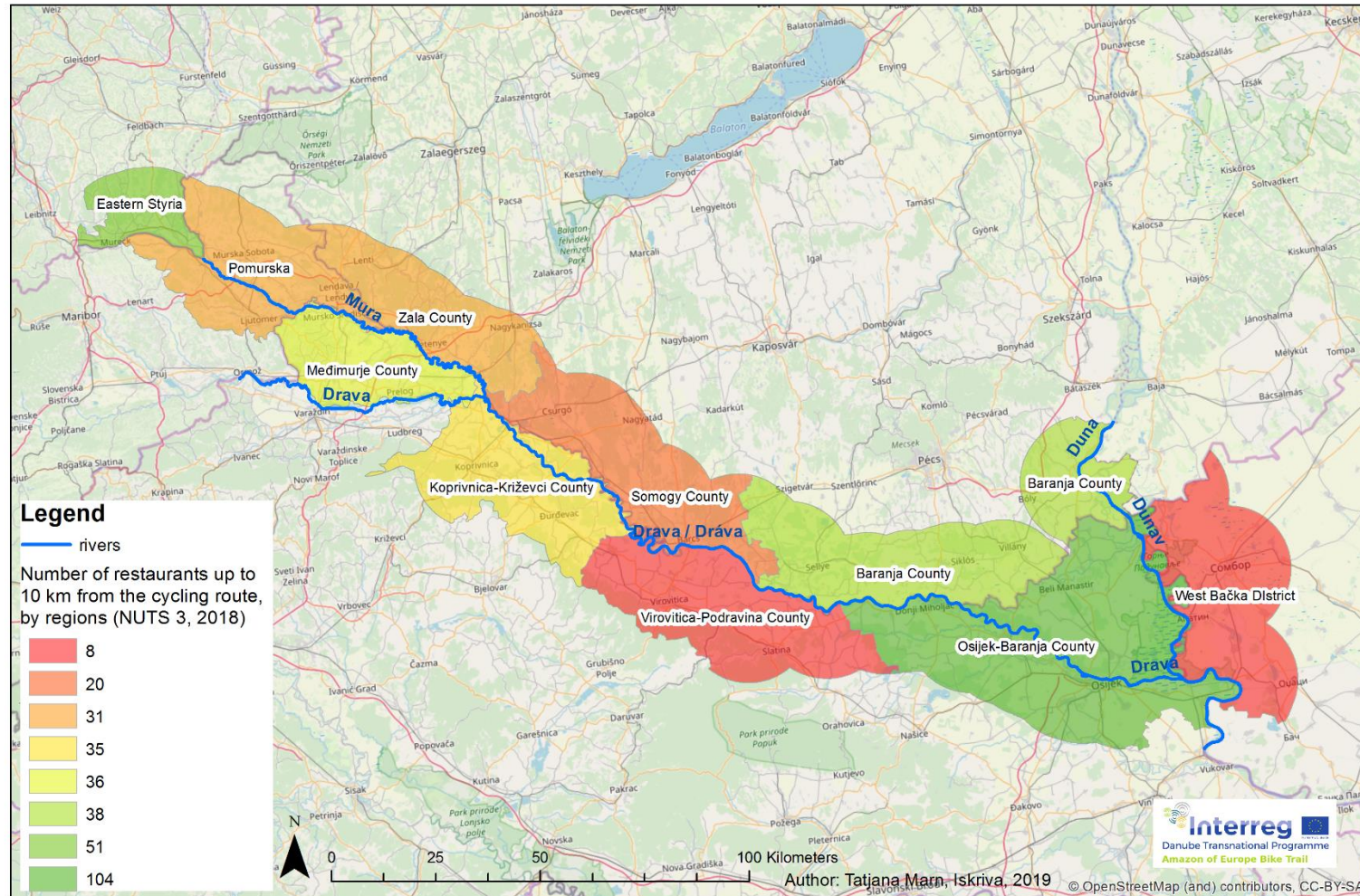
Tabela 2: Number of restaurants in the Amazon of Europe area in the zone up to 10 km away from the cycling route/river by regions

REGIONS	Number of restaurants
EASTERN STYRIA	51
POMURSKA	31
MEĐIMURJE COUNTY	36
OSIJEK-BARANJA COUNTY	104
KOPRIVNICA-KRIŽEVCI COUNTY	35
VIROVITICA-PODRAVINA COUNTY	8
ZALA COUNTY	31
SOMOGY COUNTY	20
BARANYA COUNTY	38
WEST BAČKA DISTRICT	8
TOTAL	362

Data on restaurants by regions is graphically presented in detail in the Figure 13 on the following page.

Figure 13: Number of restaurants in the Amazon of Europe area (up to 10 km from the cycling route/river) by regions

Number of restaurants in the Amazon of Europe area (up to 10 km from the cycling route/river) by regions



5.2.3 Tour operators and travel agencies



General tour operators/travel agencies: 69



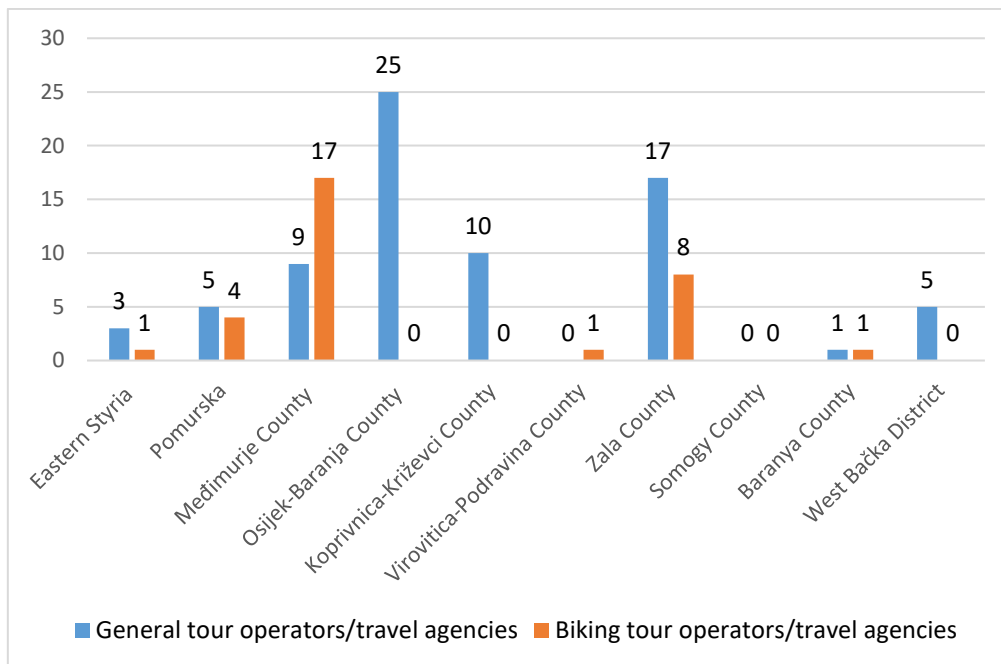
Biking tour operators/travel agencies: 26

In the Amazon of Europe on a NUTS 3 level are 69 general tour operators/travel agencies and 26 biking tour operators/travel agencies.

The NUTS 3 region with the highest number of general tour operators/travel agencies is Osijek-Baranja County (25), followed by Zala County (17). On the other hand, there are no general tour operators/travel agencies in Virovitica-Podravina and Somogy County.

The region with the highest number of biking tour operators/travel agencies is Međimurje County (17). However, there are no specialized biking tour operators/travel agencies in Osijek-Baranja, Koprivnica-Križevci and Somogy County and West Bačka District. The data indicates a need for development of specialized biking tour operators/travel agencies in some regions.

Diagram 20: General and biking tour operators/travel agencies in NUTS 3 regions in the Amazon of Europe area



5.2.4 Cycling-related infrastructure

This chapter provides an overview of cycling-related infrastructure in the Amazon of Europe area.

In the Amazon of Europe in the zone up to 10 km away from the rivers/cycling path there are 53 bike stops, 36 bike rentals, 52 bike repairs and 61 bike shops.

The region with the highest number of cycling infrastructure available is Osijek-Baranja County with 22 bike stops, 7 bike rentals, 11 bike repairs and 15 bike shops, followed by Međimurje County with 10 bike stops, 5 bike rentals, 7 bike repairs and bike shops. The region with the lowest number of cycling infrastructure is West Bačka District with 2 bike stops, 2 bike rentals, 4 bike repairs and 4 bike shops. There are no bike stops in Pomurska region, Koprivnica-Križevci County and Zala County. In some regions (Koprivnica-Križevci, Somogy, Baranya, Virovitica-Podravina County, Pomurska and West Bačka District) a lack of bike rental services is visible as well.

Cycling-related infrastructure is presented in more detail by regions in Table 10, Diagram 21 and Figure 14 on the following pages

Table 10: Cycling-related infrastructure in the Amazon of Europe area in the zone up to 10 km away from the cycling route/river by regions

REGIONS	BIKE STOPS	BIKE RENTALS	BIKE REPAIRS	BIKE SHOPS
EASTERN STYRIA	6	8	4	4
POMURSKA	0	3	3	7
MEĐIMURJE COUNTY	10	5	7	7
OSIJEK-BARANJA COUNTY	22	7	11	15
KOPRIVNICA-KRIŽEVCI COUNTY	0	1	6	6
VIROVITICA-PODRAVINA COUNTY	4	3	2	4
ZALA COUNTY	0	4	4	5
SOMOGY COUNTY	5	1	4	4
BARANYA COUNTY	4	2	6	5
WEST BAČKA DISTRICT	2	2	4	4
TOTAL	53	36	52	61

Diagram 21: Available cycling-related structure in the Amazon of Europe area (up to 10 km from the cycling route/river) by regions

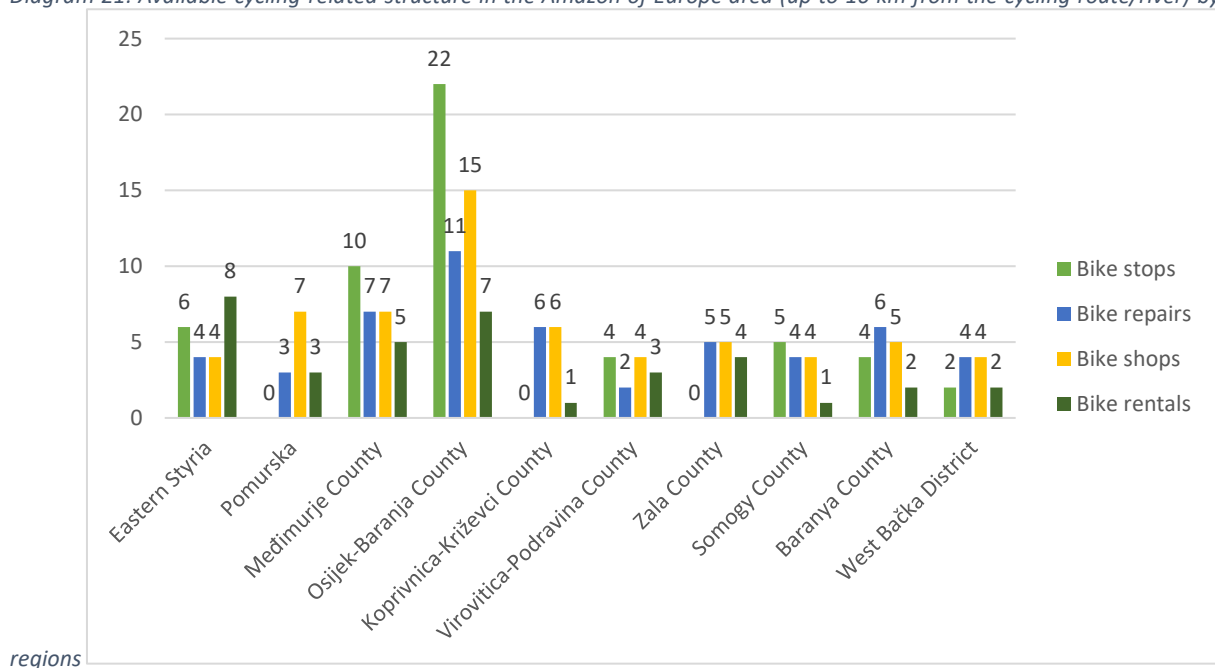
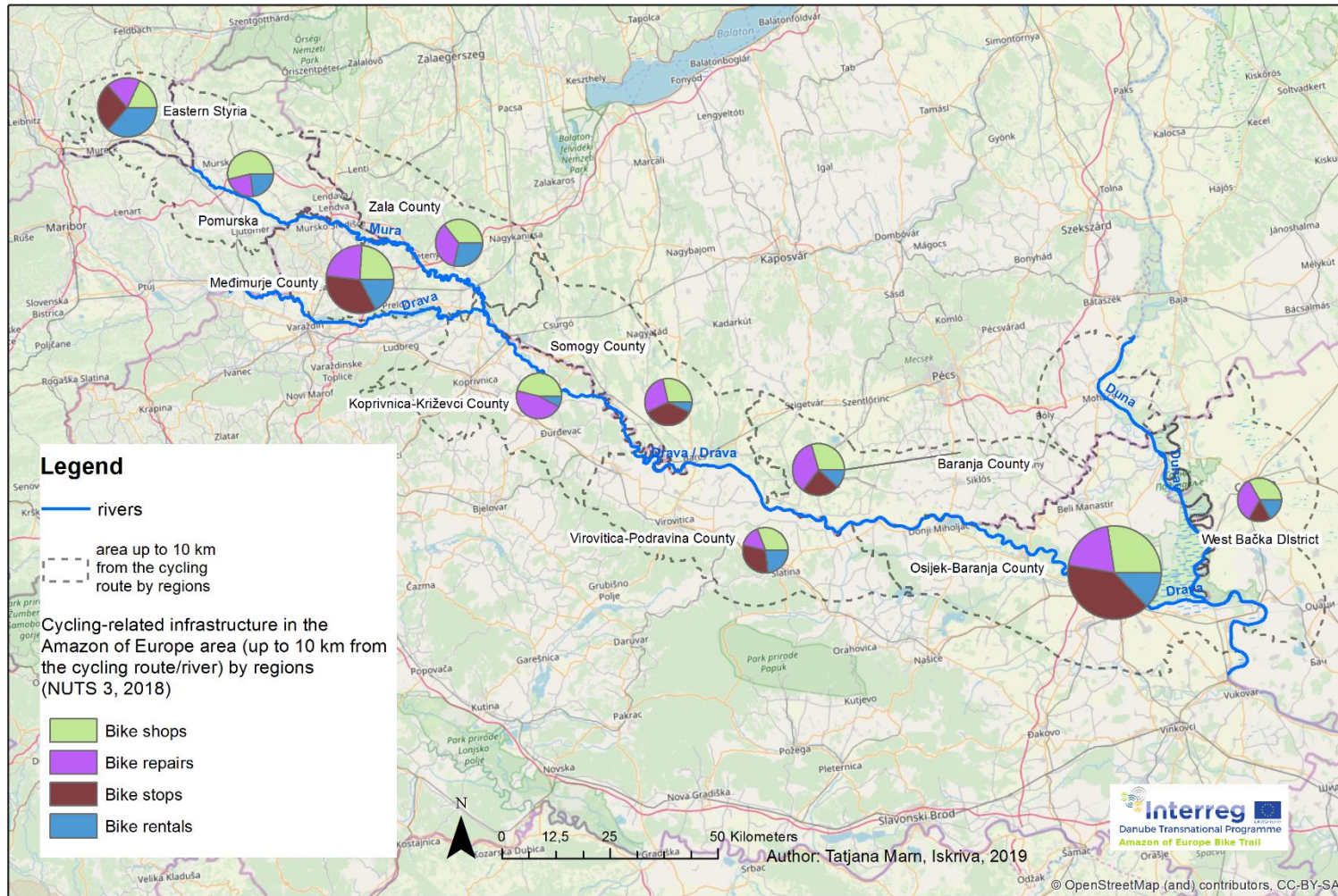


Figure 14: Cycling-related infrastructure in the Amazon of Europe area (up to 10 km from the cycling route/river) by regions

Cycling-related infrastructure in the Amazon of Europe area (up to 10 km from the cycling route/river) by regions



The Amazon of Europe area has sufficient number of available beds and culinary offer for starting a new cycling product, however in some regions there are certain areas with only few or no available accommodations and restaurants representing a challenge for the route planning and the development of the Amazon of Europe Bike Trail. Nonetheless, with several educational workshops planned to be organized with local stakeholders and the foreseen expansion of tourism in those areas we expect the offer of accommodations and restaurants will increase in the future.

On a NUTS 3 level there are plenty general tour operators and travel agencies the AoE Bike Trail partnership could establish a good cooperation with for the implementation of a B2B exclusive reselling model. Anyhow in some regions there is a lack of incoming tour operators/travel agencies that would be interested to promote and sell our product. Moreover, while cycling related tour operators/travel agencies are already common in some regions, in the others, they still don't exist. In the scope of the Amazon of Europe Bike Trail project our partnership plans to take some actions (workshops, meetings, promotional events) to raise awareness in the local communities about cycling tourism and its benefits for local economy as well as for the environment. Positively our efforts will result in increased interest of local stakeholders in cycling tourism and our fruitful cooperation.

5.3 Attractions and activities

This chapter provides an overview of main tourist attractions and leisure activities in the area near the Amazon of Europe cycling route.

Data is collected by listing most important attractions and all activity service providers in a range up to 10 km away from the cycling route if not requested differently in individual chapters. Data is accumulated in Excel tables and sorted into categories specified in chapters below.

5.3.1 Attractions

In the table below the major nature and cultural attractions, festivals and events are presented for all regions of the Amazon of Europe.

	NATURE ATTRACTIONS	CULTURAL ATTRACTIONS	FESTIVALS & EVENTS
EASTERN STYRIA	Liebmann See (lake)	Old Town Bad Radkersburg	Anradeln – the official cycling season opening (beginning of April)
			Tour de Mur – cycling by the river Mura/Stadtfest – city festival (June)
			Flanieren und Radieren – music festival in Bad Radkersburg (every Friday during summer months)
			Kürbisfest – Pumpkin festival (September)
			Christmas Market in December

	NATURE ATTRACTIONS	CULTURAL ATTRACTIONS	FESTIVALS & EVENTS
POMURSKA	Murska Sobota Lake	Expano Murska Sobota	Gornja Radgona Fair – agriculture fair
	Gajševsko Lake	Murska Sobota Castle	Marathon Three Hearts
	Prlekija Vineyards	Pomurje Museum Murska Sobota	Festival Soboški dnevi - Summer Festival in Murska Sobota
	Island of Love	Mill on the Mura - Babič Mill	Street food festival in Murska Sobota - Sočna Vilica
	Park Land of Storks	Tinek brod	Halloween Dance Rakičan
	Black Alder Forest	Homestead of writer Miško Kranjec	Pomurje Sport Festival
	River'scbool Mala Polana	Copek Mill	International Folklore Festival Beltinci
	Lendava Vineyards	Lookout tower Vinarium	Pomurje Summer Festival
	Ledavsko Lake	Sabol Homestead and the Rural Development Cooperative Pomelaj	Festival Vinarium
		Prekmurje Homestead	St. Martin day Celebrations

	NATURE ATTRACTIONS	CULTURAL ATTRACTIONS	FESTIVALS & EVENTS
MEDIMURJE COUNTY	Regional park Mura Drava	Zrinski castle	Urbanovo (wine festival)
	Bedekovićeve grabe	Mill on the Mura river	Porcijunkulovo (traditional manifestation)
	City of labirints	Monastery of st. Jelena	Martinje – St. Martin's day
	Miller's Educational Path	Road of tradition	Fašnik - carnival
		Međimurje wine road	Vincek hike's

	NATURE ATTRACTIONS	CULTURAL ATTRACTIONS	FESTIVALS & EVENTS
OSIJEK-BARANJA COUNTY	Nature park Kopački rit	City of Osijek (Co-cathedral St. Petar and Paul, European Avenue - "Art Nuoveau", Park of King Tomislav, Sakuntala park, Park of King Petar Krešimir IV. and Cinema Urania) and Tvrđa (Citadel) - the old town of the city of Osijek	Pannonian Challenge, Osijek
	Natural heritage of the River Drava	Monument and the Memorial center of the Battle of Batina	Night of wine and art, Osijek

Natural heritage of the River Danube	Norman Prandau Castle	Osijek Summer of Youth, Osijek - educational, artistic, sports and music programme
Special Ornithological Reserve of Podpanj	Castle of Eugen Savojski	UFO - Urban Fest Osijek
	Castle in Tikveš	Beer Fest, Osijek
	Sanctuary of Lady of Shelter Aljmaš	The Fishing days in Kopacevo
	Fortress of Erdut	Ferivi Half marathon, Osijek
	Cultural and Scientific Center "Milutin Milanković	Gatorfest, Banovo brdo – wine festival
	Mailath Castle	
	Prandau-Normann Castle	

	NATURE ATTRACTIONS	CULTURAL ATTRACTIONS	FESTIVALS & EVENTS
KOPRIVNICA-KRIŽEVCI COUNTY	Đurđevac Sands Special Geographical and Botanical Reserve	Easter egg from the heart	The Renaissance festival
	Crni Jarki	The Gallery roads	The festival of "Picoki"
	Veliki Pažut Special Ornithological Reserve	Intangible cultural heritage - Painting on glass in manners of naive art	The motifs of Podravina
	Čambina Significant Landscape	Bicycle monuments in Koprivnica	The Assumption of The Virgin Mary
	Repaš monument of nature	Koprivnica City Museum	Anglers to their town
	Meadow site at Zovje	Đurđevac City Museum	From Granny's Chest
	Šoderica lake	Castle Inkey	
	Čingi Lingi lake	Intangible cultural heritage - traditional dishes	
	Bilogora	Intangible cultural heritage - Handicrafts and traditional crafts	
		Intangible cultural heritage -Traditional processes	

	NATURE ATTRACTIONS	CULTURAL ATTRACTIONS	FESTIVALS & EVENTS
VIROVITICA-PODR	UNESCO Transboundary Biosfere Reserve Mura-Drava-Danube	The Count Drašković Mansion	Tradicional music festival "Songs of Podravina", Pitomača
	Lisičine arboretum, Lisičine	The Count Janković Mansion in Kapela Dvor	Living history programme "Visiting past times", Pitomača
	Count Janković valley - Nature Park Jankovac, Papuk	First champagne factory in Croatia, Slatina	Pannonia-Bilogora MTB marathon, Kapela Dvor

Sequoia gigantea Decs (Mamutovac), Slatina	Ružica city, Orahovica	The Drava River Springtime - folklore festival, Sopje
Virovitica fish-ponds, Virovitica	Franciscan Church and Monastery of St. Roch, Virovitica	Rokovo (St.Rocco's Day), 16. 8.
	Jankovć Manor, Kapela Dvor	Viroexpo
	Pejačević Castle, Virovitica	Small trains fair
		Virovitica bike tour and May Day celebration
		The cycling race „The Carp route “
		International Rock and Blues fest

	NATURE ATTRACTIONS	CULTURAL ATTRACTIONS	FESTIVALS & EVENTS
ZALA COUNTY	The Arboretum of Budafa (Budafa)	Andrássy castle (Letenye)	
	Ancient Beech-woods in Vétyem (Vétyem)	Csömödér Forest Railway (the longest narrow-gauge rail network in Hungary) Passenger transport between Lenti and Kistolmács	
	Lake of Kistolmács (Kistolmács)	Castle and watermill (museum and accomodation) in Szécsisziget	
	Thermal water (Lenti)	Permanent exhibition of the Oil Industry Museum (Bázakerettye)	
		Bunkers between Páka and Szécsisziget	
		Bunker system in Lovászi	

	NATURE ATTRACTIONS	CULTURAL ATTRACTIONS	FESTIVALS & EVENTS
SOMOGY COUNTY	Mura - Drava confluence Órtilos	Border opening Órtilos - Legrad	Border opening Órtilos - Legrad
			Family bike tour to Virovitica - Barcs-Virovitica
			eXtremeMan competition - Nagyatád
			Border running - Barcs-Virovitica

	NATURE ATTRACTIONS	CULTURAL ATTRACTIONS	FESTIVALS & EVENTS
BARANJA COUNTY		Busó Festival - Mohács	Busó Festival, Mohács
		Villányi BorZsongás Festival - Villány	Villányi BorZsongás Festival, Villány
	Palkonya Hills Foot Race - Palkonya		Palkonya Hills Foot Race, Palkonya
		Palkonya Pentecost Open Cellars - Palkonya	Palkonya Pentecost Open Cellars, Palkonya
			Villány Rosé Festival and Marathon, Villány
		Harkány Spa Festival - Harkány	Harkány Spa Festival, Harkány
		Ördögkatlan Festival - Nagyharsány, Kisharsány, Beremend, Villánykövesd, Palkonya	Ördögkatlan Festival, Nagyharsány, Kisharsány, Beremend, Villánykövesd, Palkonya
		European Wine Song Festival - Pécs, Villány	European Wine Song Festival, Pécs, Villány
		Villány Red Wine Festival - Villány	Villány Red Wine Festival, Villány

	NATURE ATTRACTIONS	CULTURAL ATTRACTIONS	FESTIVALS & EVENTS
WEST BAČKA DISTRICT	Special nature reserve of Upper Danube	The Orthodox temple of the Holy George	Wine festival, Sombor
	Marina Tromedja	Carmel church in Sombor	Poultry fair
	Sulphur water in spa Bezdán	The Town hall of Sombor	Bicycle race in Sombor
	Danube bay with wooded peninsula	Museum of the Batina battle	Days of bread
		The Orthodox temple of the Holy apostles	Fishermen evening in Apatin
		Catholic Church of Dormition of Mary	Deer & beer festival
		The Town hall of Apatin	The Lika Olympiad
		Museum of the Danube Germans	Kupusina summer

There are many nature and cultural attractions and festivals in the regions of the Amazon of Europe emphasising the richness of the area in natural and cultural values and its attractiveness for potential visitors.

5.3.2 Implemented & on-going projects

In the table below the overview of the most important implemented and on-going projects related to tourism and cycling in all regions of the Amazon of Europe is presented.

REGIONS	IMPLEMENTED AND ON-GOING PROJECTS RELATED TO TOURISM AND CYCLING
EASTERN STYRIA	- Genuss am Fluss/Glamur
POMURSKA	- coopMDD
MEĐIMURJE COUNTY	- Mura Drava Bike, - Cian 1.0 - Cian 2.0
OSIJEK-BARANJA COUNTY	- Via Pacis Panonnie - Baranja Greenways - Development of Pécs-Osijek-Antunovac-Ivanovac biking route
KOPRIVNICA-KRIŽEVCI COUNTY	- Implementation of the Operational plan of tourism development of KKC project for developing an integrated and intermodal transport in the area of the region of North Croatia - Iron Curtain Trail - INVEST-PRO - Cultervive - Cultervive II - 4 towers - CIVITAS DYN@MO - Tour de Mur - Drava Route - Development of bicycle routes and related services in the natural environment of rivers Mura and Drava - Bicycle oasis - DRAVA-GASTROLOBBY - Legrad and Ortilos on bike - Mobile 2020
VIROVITICA-PODRAVINA COUNTY	- Drava4enjoy - The Drava Story 1 - Cycling routes by the river Drava - Eurovelo 13
ZALA COUNTY	- PaNaNat - Pannon Pleasure - Sustainable water tourism along Mura and Drava River: Two Rivers one Goal - Cycle in a network 2.0 - Happy Bike -Unlimited bicycle experiences along the Mura and Drava rivers - IronCurtainCycling
SOMOgy COUNTY	- Iron Curtain Trail project (SEE) - BICBCproject (HU-HR IPA CBC)
BARANYA COUNTY	- development of the cycling infrastructure on the dike of the Drava between Tótujfalu–Felsőszentmárton, Felsőszentmárton–Drávasztára and Mailáthpuszta–Szaporca–Drávaszabolcs - Development of the bicycle route between Drávaszabolcs and Harkány (HU-HR IPA CBC) - Tourpack project
WEST BAČKA DISTRICT	- Eurovelo 6

Regional coordinators altogether reported 39 implemented or on-going projects dealing with the topics of tourism or/and cycling in the area. The results indicate the interest for cyclotourism development is present in the Amazon of Europe, though in some regions more than in others.

5.3.3 Existing regional brands

In the table below the overview of the most important existing regional brands in all regions of the Amazon of Europe that could be incorporated in the Amazon of Europe Bike Trail product is presented.

REGIONS	EXISTING REGIONAL BRANDS
EASTERN STYRIA	- Region Bad Radkersburg,
POMURSKA	- Chocolate Passero, - Tomato Lušt, - Kodila, - Pomurje Dairy, - Radenska, - Horticulture Celec, - Planika, - Ocean Orchids, - Diši po Prekmurju, - Pomelaj,
MEĐIMURJE COUNTY	- Cyclist welcome Međimurje,
OSIJEK-BARANJA COUNTY	- Pannonian challenge Osijek, - Žito Challenge Cup, Osijek, - Wine Marathon, Zmajevac, - The Fishing days in Kopacevo, - Gatorfest - Banovo brdo, Kneževi Vinogradi, Batina, Zmajevac, - Wine and Bike Tour, Erdut, - Beer Fest, Osijek, - Ferivi Half marathon, Osijek, - Summer Valpovo, - Pepper Fest Lug, - Kulenijada, Jagodnjak, - Old Sport Olympics, Brođanci, - Osijek Summer Night, - Slama land art festival, Bilje,
KOPRIVNICA-KRIŽEVCI COUNTY	- spring water Kala, - Podravka, - Nettle products, - Pan beer, - Bregi pie, - Podravinoteka, - Hedona,
VIROVITICA-PODRAVINA COUNTY	- Panonnian Cycling Routes/Panonske biciklističke staze, - Drava4Enjoy,
ZALA COUNTY	- /,
SOMOgy COUNTY	- Three Rivers Bicycle Route,

BARANYA COUNTY	<ul style="list-style-type: none"> - Busó Festival (Mohács), - Villányi BorZsongás Festival (Villány), - Palkonya Hills Foot Race (Palkonya), - Palkonya Pentecost Open Cellars (Palkonya), - Villány Rosé Festival and Marathon (Villány), - Harkány Spa Festival (Harkány), - Ördögkatlan Festival (Nagyharsány, Kisharsány, Beremend, Villánykövesd, Palkonya), - European Wine Song Festival (Pécs, Villány), - Villány Red Wine Festival (Villány),
WEST BAČKA DISTRICT	<ul style="list-style-type: none"> - Jelen beer.

The analysis showed there are many existing regional brands in the area representing a great opportunity for the AoE Bike Trail partnership to establish a good cooperation with local stakeholders along the cycling route.

5.3.4 Complementary leisure activities

In the Amazon of Europe in the zone up to 10 km away from the river/cycling route mostly guided tours (35 service providers) and wellnesses & SPAs (26 service providers) are offered. 16 service providers are offering bird watching and horse riding. There is also some existing offer for the activities connected with water (12 kayaking, canoeing, rafting providers and 11 boat tours providers). The lowest number of activity service providers offering local biking activities (10) indicates the cycling tourism is not yet well developed in the Amazon of Europe region.

The region with the richest offer of complementary leisure activities for cyclists is Koprivnica-Križevci County (30 activity service providers) and the region with the poorest offer is Virovitica-Podravina County (3 activity service providers), followed by Eastern Styria and Baranya County (5 activity service providers).

The analysis showed that in most regions there is a suitable offer of complementary leisure activities visitors could engage in aside from cycling on their trip through the Amazon of Europe area. A bookable long-distance cycling route the Amazon of Europe Bike Trail will also offer a possibility for rest days, enabling visitors to explore chosen regions more in depth and enjoy in different activities offered in the area. Nonetheless, some initiatives are still necessary to improve tourist offer in order to provide a unique travel experience for the visitors.

Complementary leisure activities are presented in more detail by regions in Figure 15 and Diagram 22 on the following pages.

Figure 15: Complementary leisure activities in the Amazon of Europe area (up to 10km from the cycling route/river) by regions

Complementary leisure activities in the Amazon of Europe area (up to 10km from the cycling route/river) by regions

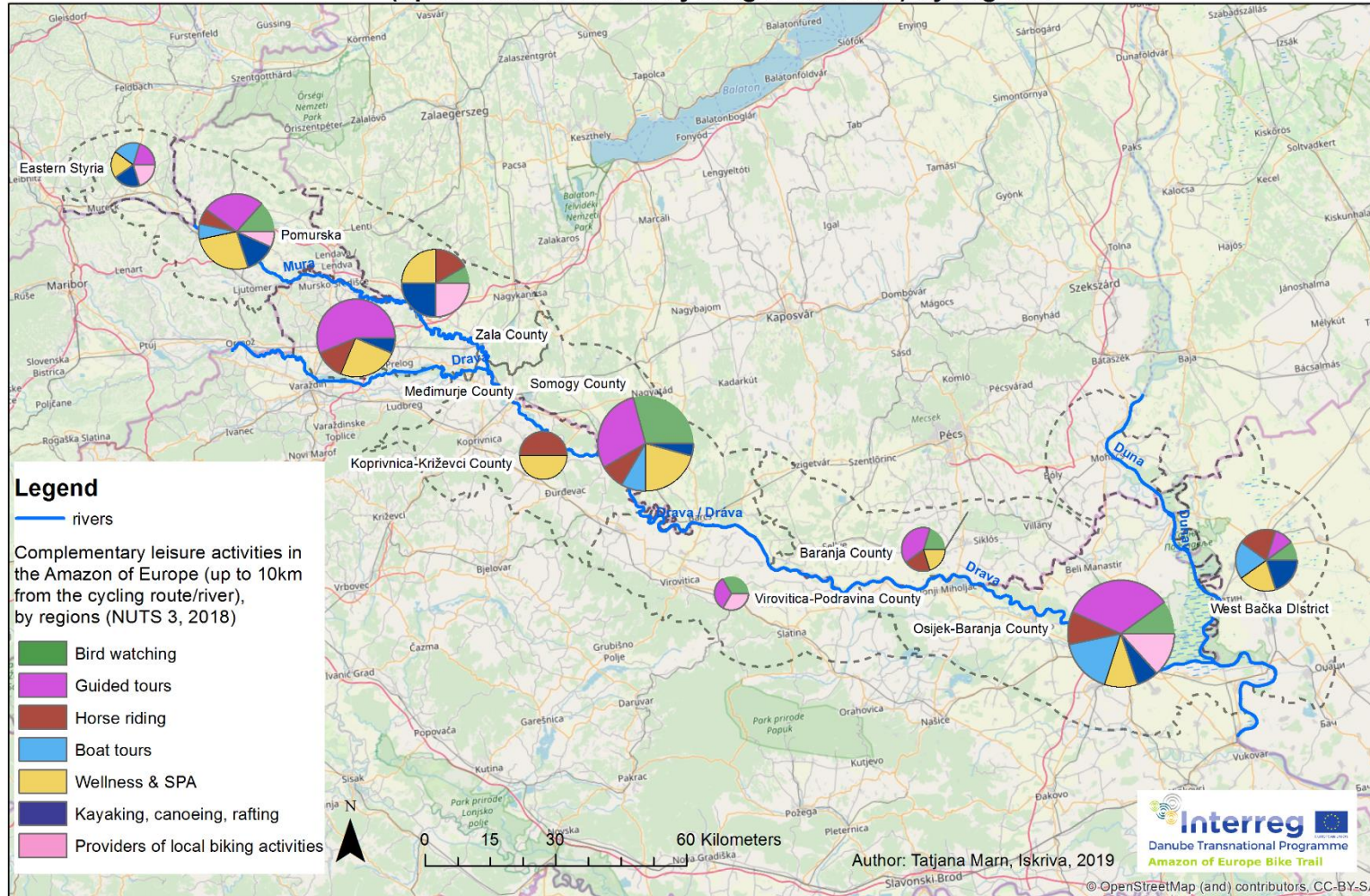
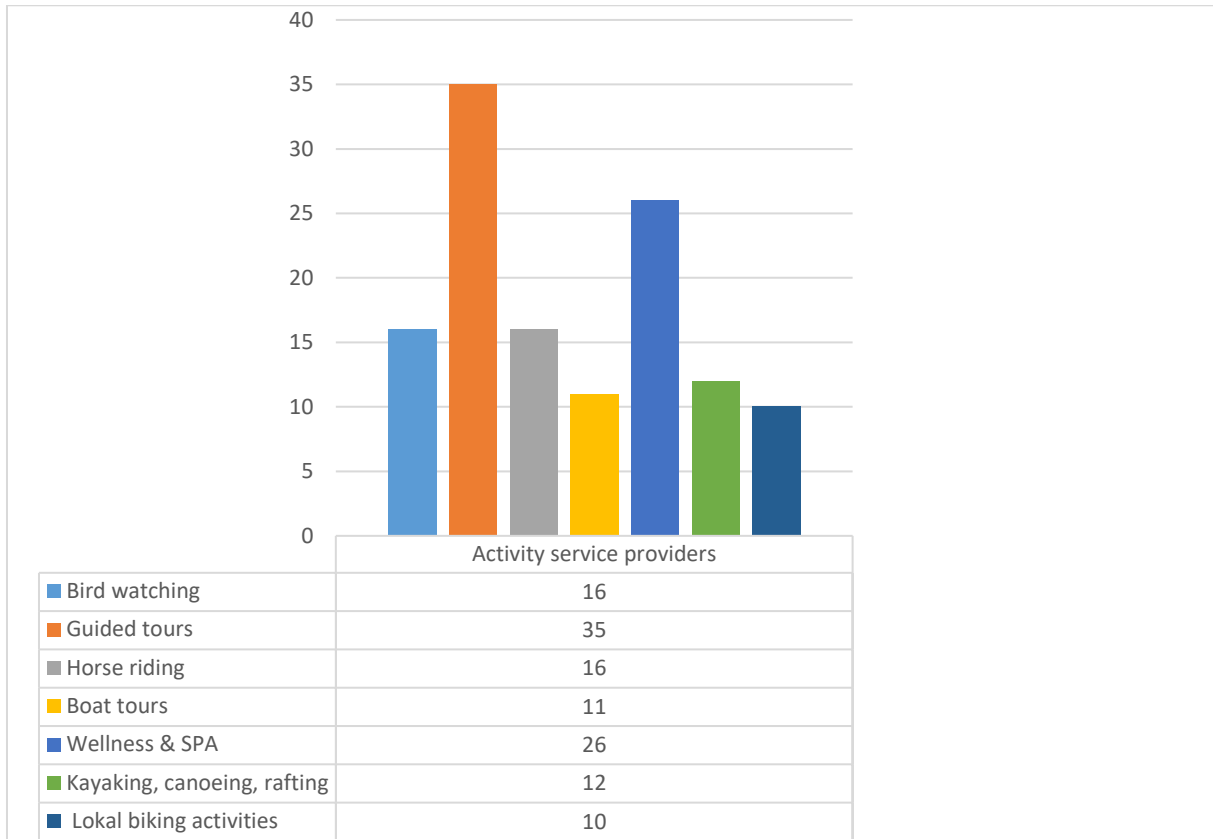


Diagram 22: Complementary leisure activities in the Amazon of Europe



6 Tourism demand/push-factors

Data for chapter 7 was collected through workshops with stakeholders that were organized in each region. Guidelines for organizing the workshops were prepared and sent to partners. Each partner wrote a report, summarizing the information on current tourism demand, collected at the first workshop. The focus of the workshop was to collect the quantitative and especially qualitative information and explanations that cannot be gathered from secondary sources.

6.1 Visitor trends

TYPICAL AMAZON OF EUROPE VISITOR



Gender: female/male



Nationality: German



Age: 30-50 years old



Duration of stay: 2-3 days



Daily spending: 30-60 €

6.1.1 Source of first contact with touristic offer of region

Most frequent sources of first contact with touristic offer of the region are the internet, social media, friends' recommendations, articles in newspapers and specialized travel magazines, promo materials and commercials. Through those channels people gather information about a travel destination before the trip. However, when people are already at the destination, they usually search information in tourist offices and tourist information centres.

6.1.2 First point of sale

The most relevant selling places for visitors are web services (online bookings), travel agencies and booking on the spot. When it comes to cycling, also specialized travel agencies are a point of sale because of the all-inclusive packages they offer. Both individually organized trips and trips organized and booked via travel agencies are common for this area.

6.1.3 Travel styles

The majority of visitors are individual guests, groups (guided tours) and visitors travelling with families or in smaller groups of friends. Business travel is common in Osijek-Baranja County and Koprivnica-Križevci County. Furthermore, in Osijek-Baranja County and West Bačka District a share of visitors arrives also by cruise ships.

6.1.4 *Main reasons to visit the area*

Main reasons to visit the area are natural beauty, thermal water (spas, wellnesses), touristic manifestations, possibility of cycling, local cuisine, cultural attractions and hunting. Moreover, in some regions day-trips and pilgrimages are popular as well.

6.1.5 *Potential barriers to visit the region*

Possible barriers to visit the region are insufficient recognisability, lack of means of public transportation, low capacity of service providers and tourism services, lack of tourism infrastructure or underdeveloped tourism infrastructure, lack of specialized tour operators, problems with reservations, not enough available information and language barriers.

6.1.6 *Average duration of stay*

The average duration of stay of visitors in the Amazon of Europe is 2-3 days, except for West Bačka District where the average duration of stay is 6 days. In Somogy County they differentiate between stopover visitors (stay 1-2 days, most of the cases they are spending their holidays at Lake Balaton) and longer-term visitors (stay at least 7 days, they are generally returning visitors with special bond with the territory and looking for private accommodations).

6.1.7 *Nationality of visitors*

In General, visitors in the Amazon of Europe mostly come from the countries within the area – from Austria, Slovenia, Croatia, Hungary and Serbia – and from Germany and Italy. The respective number of visitors is also from the Netherlands, Switzerland and Bosnia and Herzegovina.

Nationality of visitors by countries:

- **SI:** Visitors are mostly from Italy, followed by Germany, Austria, Croatia, the Netherlands and Hungary.
- **AT:** Visitors are mostly from Austria, followed by Germany, Italy and Switzerland.
- **HR:** The largest number of visitors is domestic visitors, followed by visitors from neighbouring countries (Slovenia, Serbia, Hungary, Bosnia and Herzegovina) and from Germany, Italy and Austria.
- **HU:** Most of the visitors are domestic visitors, followed by visitors from Croatia, Austria and Germany.
- **SR:** Visitors are mostly from Germany, followed by visitors from Austria, Croatia, Slovenia, Bosnia and Herzegovina and Serbia.

6.1.8 *Amount of money spent on holidays*

The visitors usually spend 30-60 € per day during their trip.

6.1.9 Age

The majority of visitors are 30-50 years old – they mostly represent so-called active tourists. The second largest group are 60+ years old visitors who mainly go to spas. The third largest group are 18-30 years old visitors.

6.1.10 Gender

In general, there are no gender-related differences in the frequency of visits of the Amazon of Europe. The exceptions are Osijek-Baranja County where most of the visitors are men and Virovitica-Podravina County where the majority of visitors are women and children.

6.1.11 Interest in local food and products

Visitors are very interested in local food, wine and autochthonous products. They like to buy products from local markets (e.g. pumpkin seed oil, fish products, etc.).

7 SWOT analysis

Amazon of Europe Bike Trail SWOT analysis presenting the key strengths and weaknesses of the cycling tourism product and demonstrating opportunities and threats for its future development is presented in the table below.

Strengths	Weaknesses
<ul style="list-style-type: none"> - Amazon of Europe is a first world five country UNESCO biosphere reserve, - bike trail crosses five countries, - bike trail goes along the rivers, - area with pristine nature, well-preserved landscape and the rich wildlife, - a wide range of complementary activities (natural and cultural sights, reach local cuisine, festivals, possibilities for bird watching, horse riding, water sports, hunting, fishing, guided tours wellness & spa), - a bookable product, - unique valorisation programme supporting nature protection projects 	<ul style="list-style-type: none"> - poor marketing of the region, - low accessibility of some parts of the region - lack of public transport, especially public transport offering bike transport services, - lack of tourism and cycling infrastructure or underdeveloped infrastructure, - lack of accommodations and restaurants in some areas, - some parts of the trail are in bad condition, - lack of off-road trails; some parts of the trail are on the main roads and therefore not very safe, - inadequate internet coverage and poor signalling of mobile networks in some places along the trail, - lack of bike guides, - lack of skills and knowledge between tourism workers and other stakeholders, - language barriers
Opportunities	Threats
<ul style="list-style-type: none"> - underdeveloped tourism destination with a great potential for tourism development, - high unemployment rate – opportunity to create new jobs in tourism industry, - long distance bike trails are gaining popularity in the past years, - EU Policy actions are promoting sustainable tourism and sustainable mobility, - many on-going tourism and cycling related projects in the respective regions 	<ul style="list-style-type: none"> - competition of other already existing bike trails, - local population is not always open minded and well-motivated, the same partially applies in case of local service providers, - low awareness about significance of cycling tourism in some regions of the AoE, - skilled tourism workers are leaving the region, - challenges of working in 5 countries: different legislation, administrative barriers

8 Amazon of Europe Bike Trail organizational model

8.1 The challenge of developing tourism projects

In many cases, tourism projects, especially if they are funded projects, are mainly geared towards the construction of infrastructure. If anything, the projects have marketing added in some cases, but seldom a product development has been integrated. This means that projects such as transnational cycle paths are faced with the following situation after the official project completion:

- An overall organizational structure is usually not implemented.
- Maintaining the cycle path depends mostly on the individual commitment of the respective regional organizations through whose territory the route leads (no overall quality management possible).
- The marketing for the cycle path depends exclusively on the commitment of local, regional or national tourism organizations (no coordinated, overall marketing possible).
- The impact on the region is neither measurable nor controllable. With regard to added value, it is only possible to hope for self-organized individual tourists or the activities of external travel agencies. The offered products of the travel agencies are beyond to any quality, price and fairness control.

8.2 The proposed solution

The "Amazon of Europe Bike Trail" project was designed from the beginning to provide long-term, sustainable management for the benefit of optimized regional value creation and protection of nature. This requires a holistic organizational structure, following the example of American ("Conservancy") or British ("Trust") trails. The core tasks of this organizational structure include:

- Design, maintenance and further development of the trail.
- Communication including Brand Management, Community Building and Valorisation Program.
- Booking management and distribution in the form of a licensed Booking Center.

The main features of this organizational structure are presented in figure 16 on the next page.

Figure 16: Amazon of Europe Bike Trail Organizational Model

AMAZON OF EUROPE BIKE TRAIL ORGANIZATIONAL STRUCTURE (OVERVIEW)



The essence for a long-term success, refinancing and regional value creation will be the design and implementation of an integrated organizational model at two levels:

1. Amazon of Europe Bike Trail Conservancy, consisting of members of the Amazon of Europe Bike Trail project consortium, and if needed further members, to assure coverage of the whole Bike Trail territory;
2. and as a follow up, the set-up of the licensed "Amazon of Europe Bike Trail Booking Center".

8.2.1 Amazon of Europe Bike Trail Conservancy

Characteristics of the Amazon of Europe Bike Trail Conservancy are the following:

- The owner of the "Amazon of Europe Bike Trail" product is the Amazon of Europe Bike Trail Conservancy.
- This consists of the project partners of the Interreg project "Amazon of Europe Bike Trail".
- One of the main tasks of the Amazon of Europe Bike Trail Conservancy is to provide customers with a bookable cycling product for the "Amazon of Europe Bike Trail".
- This task will be delegated to an "Amazon of Europe Bike Trail Booking Center" through a licensing partnership.
- For this service, the Amazon of Europe Bike Trail Conservancy may charge a royalty from the Amazon of Europe Bike Trail Booking Center.
 - o Note: This step is recommended only after a successful launch (e.g. after 3-5 years).

- As part of the Amazon of Europe Bike Trail business model, an impact fee is defined and subsequently collected. This impact fee financially supports selected projects for the benefits of nature under the Amazon Europe Bike Trail Valorisation Program.

8.2.2 Amazon of Europe Bike Trail Booking Center

The general principle is: “The Amazon of Europe Bike Trail Booking Center is much more than a travel agency!”

In contrast to the hitherto conventional approaches that individual guests somehow organize their bike tour themselves or travel agencies are active on their own and offer products on the bike path, the model of the licensed booking center has the following features:

1. Controllability and ownership: The booking center is licensed by the project owner (Conservancy, Trust). This means that the owner can design and manage the organizational model by means of a license agreement. If the booking center does not work in accordance with the values of the "Amazon of Europe Bike Trail", the booking center can be terminated before the contract period or the contract can no longer be renewed.
2. Active product design: The booking center is responsible for developing and selling trail products that comply with the values of the "Amazon of Europe Bike Trail" and ensure the required individuality and service by the clients.
3. Service provider development: The booking center is responsible for developing the regional service partners with a defined qualification program. This is ideally done within the "Amazon of Europe Academy" to be founded and includes pricing, quality and service skills.
4. Fairness and Compliance: Based on the digital structure of the trail management system to be implemented, the business model cannot only be continuously evaluated and adapted, it also guarantees maximum transparency. According to the principle: "Everybody knows what proportion he receives in the business model."
5. Valorisation program: The booking center has the task of communicating the valorisation program as part of its trail products and sales activities, charging it by an impact fee in accordance with the license agreement and transferring it to the umbrella organization.
6. Booking management: The booking center offers the trail products mentioned under point 2) to individual guests and handles them locally, in close cooperation (partner contracts) with the regional service providers. The booking center is also authorized to resell selected Trail products to external travel agencies. The travel organisation on site, however, is reserved exclusively for the booking center.

7. Neither the umbrella organization nor the licensed booking center can exclude other travel agencies from their own activities on the trail. However, in order to strengthen the business model for the "Amazon of Europe Bike Trail", the licensed booking center enjoys the following advantages:
- a) the exclusive right to market the brand for the "Amazon of Europe Bike Trail";
 - b) the exclusive right to designate itself as the "Official Booking Center for the Amazon of Europe Bike Trail";
 - c) the assurance by the licensing umbrella organisation, that all marketing and communication activities, especially those from the project website, will be directed to the "Official Booking Center".

Characteristics of the Amazon of Europe Bike Trail Booking Center are the following:

- The Amazon of Europe Bike Trail Booking Center does all the travel agency and on-site service and booking services for the Amazon of Europe Bike Trail.
- The Amazon of Europe Bike Trail Booking Center has all legal requirements for this (travel certifications, private company form).
- The Amazon of Europe Bike Trail Booking Center will undertake these tasks through a licensing partnership (see above) with the Amazon of Europe Bike Trail Conservancy.
- The Amazon of Europe Bike Trail Booking Center performs the following tasks in detail:
 - o Inquiry and booking management for individual guests.
 - o Inquiry and booking management for international B2B travel agency partners.
 - o The management towards the regional service provider partners.
- The Amazon of Europe Bike Trail Booking Center implements a defined business model geared towards sustainability and regional value added:
 - o Transparent and fair design of travel agency conditions.
 - o Transfer of a defined "Impact Fee" to the Amazon of Europe Bike Trail Conservancy for the support of selected projects of the Valorisation Program.
 - o Consulting, qualification and promotion of regional service partners in the form of a partnership agreement. Based on this contract, the regional service partners benefit as follows:
 - Beneficiary through integration into the business model,
 - Advising pricing strategy (for achieving higher, market & service fair prices),
 - Further value adding measures (such as one-night surcharge).
 - o Later on, these partnerships shall be developed into the „Amazon of Europe Bike Trail Academy “.

8.2.3 Amazon of Europe Bike Trail service provider partner

Characteristics of the Amazon of Europe Bike Trail service provider partners are the following:

- These are affiliated with the Amazon of Europe Bike Trail Booking Center through a partnership agreement and are thus part of the Amazon of Europe Bike Trail Organizational Model.
- They benefit from the defined, transparent and sustainable organizational model (see above).

- Regional service provider partners in the Amazon of Europe Bike Trail organizational model can be:
 - o accommodations,
 - o mobility services,
 - o certified bike guides,
 - o providers of experience programs,
 - o bike rentals and bike services.

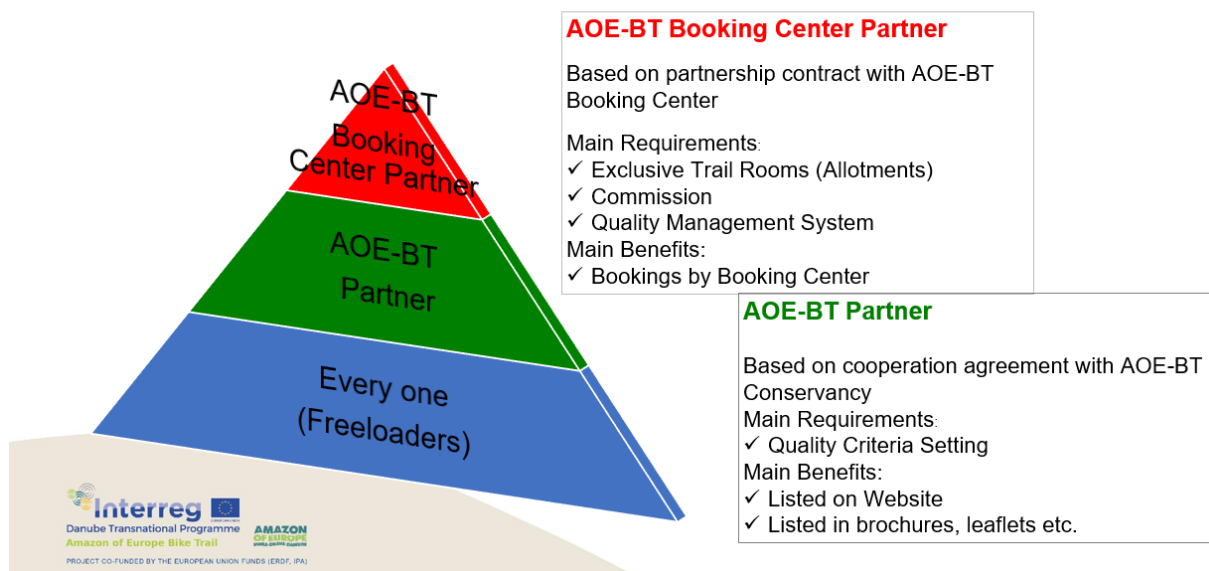
8.2.4 Stakeholder involvement

Figure 17 presents the model of stakeholder involvement in the Amazon of Europe Bike Trail organizational model.

Figure 17: Amazon of Europe Bike Trail Stakeholder Involvement Model

Stakeholder Involvement

The model



In the table 11 the prognosis of foreseen number of regional stakeholders included in the Amazon of Europe Bike Trail organizational model by types of stakeholders is presented.

Table 11: Prognosis of regional stakeholders included in the Amazon of Europe Organizational Model by types

	Contracted by AoE Bike Trail Service- & Booking Center	Partners of the AoE Bike Trail project (Website; Guidebook; Leaflets)	Everyone (free loaders)
Accommodations	75	200	Even more; cannot be estimated
Mobility Services	20	100	Even more; cannot be estimated
Bike Guides	40	100	Even more; cannot be estimated
Experience programme operators	30	100	Even more; cannot be estimated
Bike rental & service	20	100	Even more; cannot be estimated
Shops, restaurants	No contracting	300	Even more; cannot be estimated

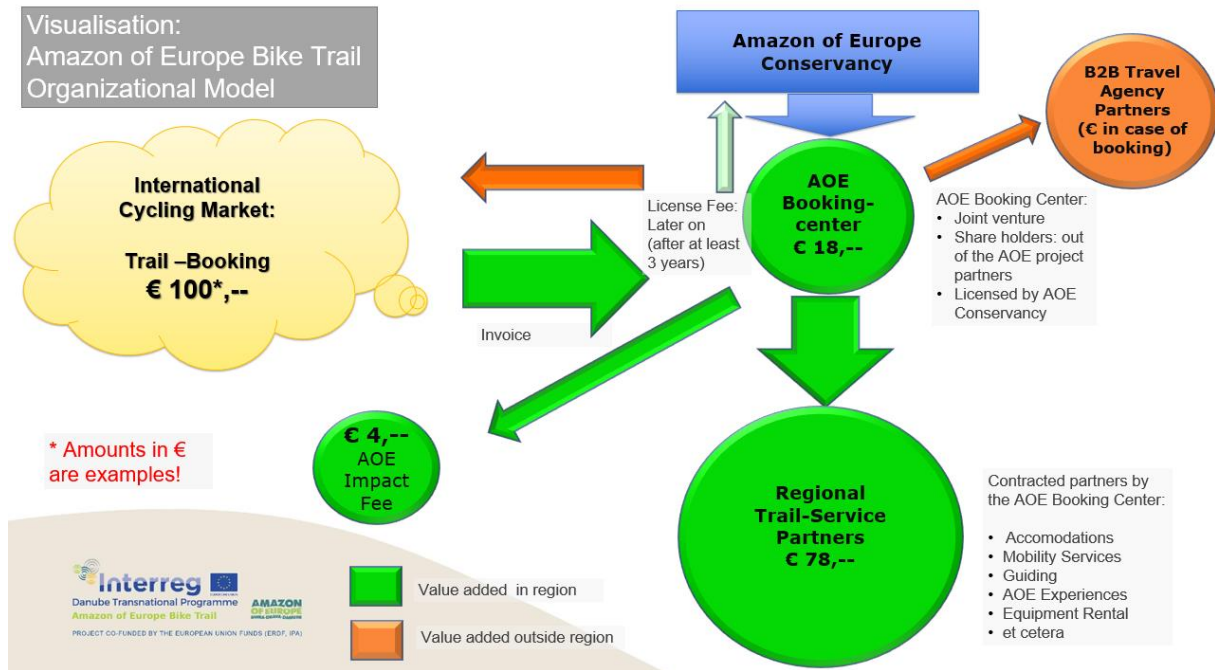
8.2.5 Organizational model

The Amazon of Europe Bike Trail organizational model is based on 3 pillars:

- The organizational model is proactively managed by the project owners.
- The organizational model is designed to maximize regional value creation.
- The organizational model is participatory and seeks to integrate as many regional stakeholders as possible.

The Amazon of Europe Bike Trail organizational model is graphically presented in the figure 18.

Figure 18: The Amazon of Europe Bike Trail organizational model



8.3 Estimated revenues of the product

Based on the product development as presented in the chapters above, we have modelled some basic financial projections for the period of 10 years after the launch of the cycling product Amazon of Europe Bike Trail, i.e. for the period 2021-2031. We have based the model on assumptions for the number of cyclists booking the trail via the official booking center per year, average duration of stay, and average amount spent. Please note that these are very basic projections estimated on numbers known by similar existing cycling/trail products in central Europe.

In the following three tables the realistic, optimistic and pessimistic projections of AoE Bike Trail revenues are presented for the years 2020-2031.

Projections are based on the following assumptions:

- Average duration of stay: 5 days
- Daily spending per cyclist: 60,00 €

Total revenue earned by the Amazon of Europe Bike Trail product will be distributed as shown at figure 18, with almost total amount spent in the region for the service providers, impact fee and operation of the booking centre. The only amount spent outside will be the fees to external B2B travel agency partners.

Gained AoE Bike Trail Booking Centre revenues will be used for the following purposes:

- to cover operational costs,
- to cover the costs of marketing,

- to support valorisation projects dealing with sustainable development topics in the region (nature protection, education, tourism, sports, etc.), as proposed by the Valorisation Programme.

Table 12: Financial projections – realistic scenario

Amazon of Europe Bike Trail planned revenues – realistic scenario				
Year	Number of cyclists	Number of overnight stays	Total revenue of the AoE Bike Trail product	AoE Bike Trail Booking Center revenue
2020	0	0	0	0
2021	1.000	5.000	300.000,00 €	45.000,00 €
2022	1.100	5.500	330.000,00 €	49.500,00 €
2023	1.210	6.050	363.000,00 €	54.450,00 €
2024	1.331	6.655	399.300,00 €	59.895,00 €
2025	1.464	7.321	439.230,00 €	65.884,50 €
2026	1.611	8.053	483.153,00 €	72.472,95 €
2027	1.772	8.858	531.468,30 €	79.720,25 €
2028	1.949	9.744	584.615,13 €	87.692,27 €
2029	2.144	10.718	643.076,64 €	96.461,50 €
2030	2.358	11.790	707.384,31 €	106.107,65 €
2031	2.594	12.969	778.122,74 €	116.718,41 €

Table 13: Financial projections – optimistic scenario

Amazon of Europe Bike Trail planned revenues – optimistic scenario				
Year	Number of cyclists	Number of overnight stays	Total revenue of the AoE Bike Trail product	AoE Bike Trail Booking Center revenue
2020	0	0	0	0
2021	1.000	5.000	300.000,00 €	45.000,00 €
2022	1.200	6.000	360.000,00 €	54.000,00 €
2023	1.440	7.200	432.000,00 €	64.800,00 €
2024	1.728	8.640	518.400,00 €	77.760,00 €
2025	2.074	10.368	622.080,00 €	93.312,00 €
2026	2.488	12.442	746.496,00 €	111.974,40 €
2027	2.986	14.930	895.795,20 €	134.369,28 €
2028	3.583	17.916	1.074.954,24 €	161.243,14 €
2029	4.300	21.499	1.289.945,09 €	193.491,76 €
2030	5.160	25.799	1.547.934,11 €	232.190,12 €
2031	6.192	30.959	1.857.520,93 €	278.628,14 €

Table 14: Financial projections - pessimistic scenario

Amazon of Europe Bike Trail planned revenues – pessimistic scenario				
Year	Number of cyclists	Number of overnight stays	Total revenue of the AoE Bike Trail product	AoE Bike Trail Booking Center revenue
2020	0	0	0	0
2021	100	500	30.000,00 €	4.500,00 €
2022	200	1.000	60.000,00 €	9.000,00 €
2023	300	1.500	90.000,00 €	13.500,00 €
2024	400	2.000	120.000,00 €	18.000,00 €
2025	500	2.500	150.000,00 €	22.500,00 €
2026	600	3.000	180.000,00 €	27.000,00 €
2027	700	3.500	210.000,00 €	31.500,00 €
2028	800	4.000	240.000,00 €	36.000,00 €
2029	900	4.500	270.000,00 €	40.500,00 €
2030	1.000	5.000	300.000,00 €	45.000,00 €
2031	1.100	5.500	330.000,00 €	49.500,00 €

As mentioned, the calculations in the tables 12-14 are very basic ones based on currently known data of similar trails applied to assumptions for the Amazon of Europe Bike Trail product. As can be seen from tables 12-14, in each case the product will gain revenues and have considerable impact in the region, enhancing the operation of existing service providers and supporting the opening of new local business. However, from the business perspective, only realistic and optimistic scenario seem feasible to be run on the market, with additional private investment supporting the operation of the booking center. In case of pessimistic scenario, the collected revenue cannot be sufficient to run the booking center. In any case, much more detailed calculations are needed to develop further the organisational model and the business case of the Amazon of Europe Bike Trail product, which is the task of other activities in the Amazon of Europe Bike Trail project.

9 Conclusions

Amazon of Europe Bike Trail passes along Mura, Drava and Danube rivers through five countries (Austria, Slovenia, Croatia, Hungary, Serbia), partly covering 11 NUTS 3 regions (Eastern Styria, Pomurska, Varaždin County, Međimurje County, Koprivnica-Križevci County, Virovitica-Podravina County, Osijek-Baranja County, Zala County, Somogy County, Baranya County and West Bačka District). It connects 10 protected areas (Natura 2000 Site and Protected Landscape – Mura (AT), Natura 2000 Site – Mura (SI), Natura 2000 Site – Mura (HU), National Park Danube-Drava (HU), Regional Park Drava-Mura - Natura 2000 (HR), Nature Park and Special Zoological Reserve Kopački Rit (HR), National Ecological Network – Danube (HR), Special Nature Reserve Gornje Podunavlje (RS), Special Nature Reserve Karadjordjevo (SR), Nature Park Tikvara (SR)) into the planned first UNESCO five-country Biosphere Reserve in the world. This stunning riverine landscape contains both amazing natural beauty and rich cultural heritage, thus representing a great tourist potential.

The Amazon of Europe (NUTS 3 level) covers the area of 22.740,29 km² with the population of 2.084.658 people. The analysis shows the trend of emigration of people from the area in the years 2013-2017. Crude rate of net migration plus statistical adjustment (per 1.000 inhabitants) for the year 2017 is -6,9. In the similar period (2012-2016) GDP at current market prices (€/inhabitant) and number of employments were growing. Average GDP of the Amazon of Europe regions in the year 2016 was 10.420 € while average national GDP of the countries included in the Amazon of Europe was 17.660 € in the same year. The data indicates that border regions are significantly less developed than the national average in all countries. In the Amazon of Europe regions only 55,05% of all people available for work were employed in the year 2016. The most economically developed region of the Amazon of Europe was Eastern Styria and the least developed Virovitica-Podravina County.

In the year 2017, the Amazon of Europe (NUTS 3 level) recorded approximately 3,2 million tourist arrivals with the annual growth rate 2,7% from the year 2016 to 2017 and approximately 9,7 million overnight stays with the annual growth rate 2,1% from the year 2016 to 2017. The region with the most tourist arrivals and overnight stays was Eastern Styria and the region with the least was West Bačka District. In the year 2017, the highest numbers of tourist arrivals and overnight stays in the Amazon of Europe were in June and July indicating a strong seasonal pattern in summer. The short period of peak touristic season presents an opportunity for the Amazon of Europe Bike Trail partnership to extend the season to spring and autumn months by offering a new bookable biking product to potential tourists. Due to increasing trend in tourist arrivals and overnight stays the time for entering a tourism market with a new cycling product is appropriate, however a lot of efforts in marketing will be needed in order to gain a visible position on the market, raise international awareness about our product and attract new guests.

The Amazon of Europe Bike Trail area is quite well connected with public transport, while much improvement is needed for specialized biking shuttle services. The area is accessible from the following nearby airports: Graz Airport (AT), Zagreb Airport (HR), Osijek Airport Klisa (HR), Budapest Airport (HU), Hévíz-Balaton international airport (HU). Larger cities have great connections by bus and train whereas smaller towns and villages are more difficult to reach. In some cases, local buses, shuttles or taxi services are available in larger cities to take the

cyclist to the starting point of the bike trail. However, the analysis has shown the lack of public transport, especially public transport offering bike transport services in most regions.

The Amazon of Europe area has sufficient number of available beds for starting a biking product. The area in total offers 548 accommodations and 15.907 beds within the area of 10 km away from the cycling route/river. The highest number of available beds is in 4* hotels, followed by 3* hotels, private apartments and campsites and the lowest number of available beds is in 5* hotel, followed by 2* hotels and touristic farms. The highest number of accommodation facilities can be found in Zala County and the lowest in West Bačka District. The region with the richest offer of available beds is Baranya County and the region with the poorest offer is Koprivnica-Križevci County, closely followed by West Bačka District. There are altogether 362 restaurants in the zone up to 10 km away from the river/cycling route. The highest number of restaurants is in Osijek-Baranja County and the lowest number is in Virovitica-Podravina County and West Bačka District. In the Amazon of Europe area 53 bike stops, 36 bike rentals, 52 bike repairs and 61 bike shops are available near the bike trail. The region with the highest number of cycling infrastructure available is Osijek-Baranja County, followed by Međimurje County and the region with the lowest number of cycling infrastructure available is West Bačka District. In general, the analysis showed the lack of cycling infrastructure in the area. There are no bike stops in Pomurska region, Koprivnica-Križevci County and Zala County. Especially challenging for AoE Bike Trail product can be the lack of bike rental services in some regions (Koprivnica-Križevci, Somogy, Baranya, Virovitica-Podravina County, Pomurska and West Bačka District). The area is in general well covered with additional services, especially around cities and bigger settlements. In some less inhabited areas, the services are missing. We estimate that there are sufficient capacities in tourism and cycling-related infrastructure available in the Amazon of Europe for starting a biking product, however in order to maintain the quality of our services and expand the offer through time, a lot of work is still required in that field in the future. The predicted improvements necessary are better transport connections to start and end points of the cycling route such as new public transport connections, shuttle services, luggage services, etc. Furthermore, the establishments of new bike rentals, accommodation units and restaurants, especially in rural areas, will be essential in the future.

In the Amazon of Europe in the zone up to 10 km away from the river/cycling route mostly guided tours (35 providers) and wellness & SPA activities (26 providers) are available for tourists as complementary offer to cycling. Additionally, 16 service providers are offering bird watching and horse riding, 12 activities such as kayaking, canoeing and rafting and 11 offering boat tours. Only 10 activity service providers are offering local biking activities which indicate there is still some space for further development of cycling tourism offer in the Amazon of Europe. The region with the richest complementary touristic offer for cyclists is Koprivnica-Križevci County (30 activity service providers) and the region with the poorest offer is Virovitica-Podravina County (3 activity service providers), followed by Eastern Styria and Baranya County (5 activity service providers).

In the regions of the Amazon of Europe (NUTS 3 level) there are altogether 69 general tour operators/travel agencies and 26 tour operators/travel agencies specialized in cycling. The most general tour operators/travel agencies are in Osijek-Baranja County and there are none in Virovitica-Podravina and Somogy County. The highest number of biking tour

operators/travel agencies is in Međimurje County. However, there are no specialized biking tour operators/travel agencies in Osijek-Baranja, Koprivnica-Križevci and Somogy County and West Bačka District. The data indicates a need for development of specialized biking tour operators/travel agencies in some regions of the Amazon of Europe.

Furthermore, the analysis provides an overview of the most important nature and cultural attractions, festivals, events and existing local brands in the regions of the Amazon of Europe that could be incorporated in the AoE Bike Trail product. Many existing attractions and regional brands in the area represent a great opportunity for the AoE Bike Trail partnership to establish a good cooperation with local stakeholders along the cycling route. Moreover, regional coordinators reported 39 implemented or on-going projects dealing with the topics of tourism or/and cycling in the area. The results indicate the interest for cyclotourism development is present in the Amazon of Europe, though in some regions more than in others.

The most typical current visitor of the Amazon of Europe is either female or male from Germany aged between 30-50 years. On average she/he stays on holidays for 2-3 days and spends 30-60 € per day. Most likely she/he heard about the holiday destination on the internet, from friends or read about it in an article in a newspaper. She/he booked holidays via online booking system or in a travel agency. She/he is travelling alone, with family or with a small group of friends. She/he likes natural beauty, wellness, touristic manifestations, cycling and cultural attractions, and is interested in local cuisine, wine and local products.

The analysis has shown that both tourism in general and cycling tourism in particular are already present in the most parts of the Amazon of Europe, however, there is still plenty of space for further tourism development in order to reach its optimal potential. Despite the lack of tourism and cycling infrastructure in some areas the region shows promising prospects to become a popular sustainable cycling destination due to its pristine nature, biodiversity and rich cultural heritage. Based on the findings, the partnership of the project Amazon of Europe Bike Trail is developing a flagship sustainable tourism product the Amazon of Europe Bike Trail that will connect already existing bike routes in five participating countries into a joint bookable product while at the same time preserving the environment. In order to establish a long-term sustainable tourism destination where visitors can peacefully cycle along the rivers and relax, mass tourism will be avoided. The organisational model foresees development of the Amazon of Europe Bike Trail Conservancy, a consortium which will take care of the trail marketing, maintenance and valorisation programme. The Conservancy will also licence an official Amazon of Europe Bike Trail Booking Centre which will take over the product bookings.

Key challenges to the success of the Amazon of Europe Bike Trail are low accessibility of some parts of the region, lack of tourism and cycling infrastructure, lack of accommodations and restaurants in some areas and lack of skills and knowledge between tourism workers and other stakeholders. The partnership will put a lot of efforts into educating local stakeholders about the product, booking system, nature-oriented visitor guidance, etc. in order to ensure high quality of the offer. For that purpose, the Amazon of Europe Bike Trail Academy: Capacity building programme for service providers will be implemented. Moreover, the aim is also to raise the awareness about the cycling tourism and its benefits among the stakeholders and increase their self-initiative behaviour, resulting in the cooperation and development of new products and services in that field.

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