



MTB Tourism Assessment

klue•



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KASVUA KESTÄVÄSTÄ
MATKAILUSTA
Yhteisö kestävämmäksi



KIDEVE
Elinkeinopalvelut - Kittilä



Kittilä



LAPIN LIITTO

Vipuvoimaa
EU:lta
2014-2020



European Union
European Regional Development Fund







Vision and Mission

Levi as the leading tourism destination of Finland, should also be on the forefront of the fast-developing MTB tourism and cycling sector.

The setup of Levi for that vision is ideal:

Already now Levi offers good services for MTB tourists, has a big variety of trails, accommodation services and local know-how of mountain biking.



Approach

Our team of internationally experienced experts analyzed the destination during the late autumn season of 2022. We included different stakeholders within the community and tourism from the initial stages of the assessment process.

In September, Allegra-Klue trail specialist Chris Bernhardt visited Levi and evaluated the first part of the assessment. After this, in October Jordan Carr rated local trails, transportation, hotels, scene and services available to mountain bikers.

During our visit we also met with local stakeholders to discuss opportunities and local goals around mountain bike tourism which focused on offering experiences and services to keep guests here longer in the summer months. Local business development around mountain bike tourism like guiding, mechanic services, transportation, and skills instruction were also on the agenda.

Our agreement between Kittilä municipality (Kideve) consisted two days of on site assessment reporting is mainly based on this and follow-up meetings. In addition, we have had several discussions with local companies, operative level staff and local MTB scene.



Why Mountain Biking?

Mountain biking has seen large growth numbers in the past 30 years, growing into an important strategic pillar for summer tourism in the Alps, as well as the rest of Europe or the U.S.

As part on the megatrend in society the bicycle becomes more and more fashionable as a means of commuting, as a status symbol and as a leisure time activity and sport.

Large ski resorts like Lenzerheide and Sölden, have seen growth numbers in MTB visitors and ticket sales of up to 50% in the past ten years, currently selling between 70'000 and 190'000 MTB day passes per summer season.

According to recent research, outdoor activities are booming worldwide. There are many indicators that support the thesis that outdoor activities will further grow in popularity.

This is showcased by the following figures:

- Globally, adventure tourism now valued at \$445 billion is expected to grow to \$1'335 billion by 2023
- Hiking and cycling are expected to make up for 32.5 % among tourism products in rural destinations in the future

The e-bike sector has grown rapidly in recent past. Despite the high number of sold electric bicycles so far, manufacturers estimate that market saturation will exceed 50% in 2021. This means that the number of electric bikes in circulation is expected to double in the next 15 to 20 years.

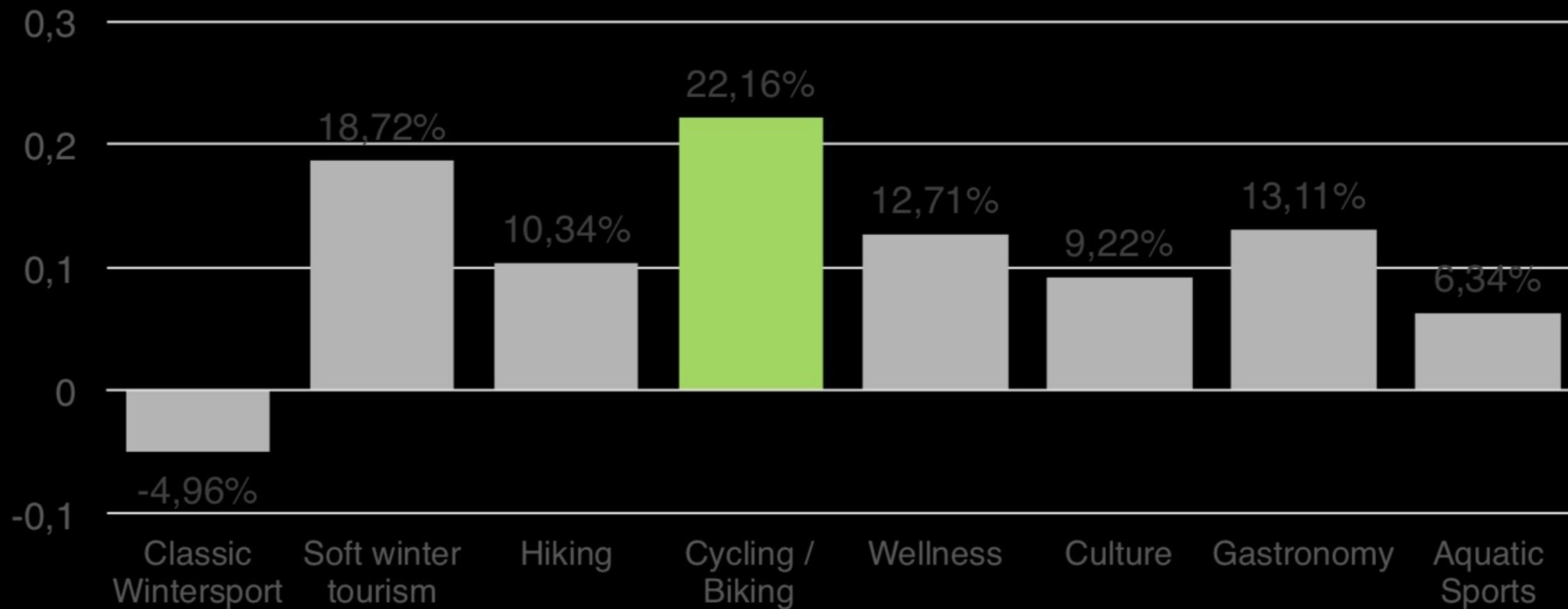




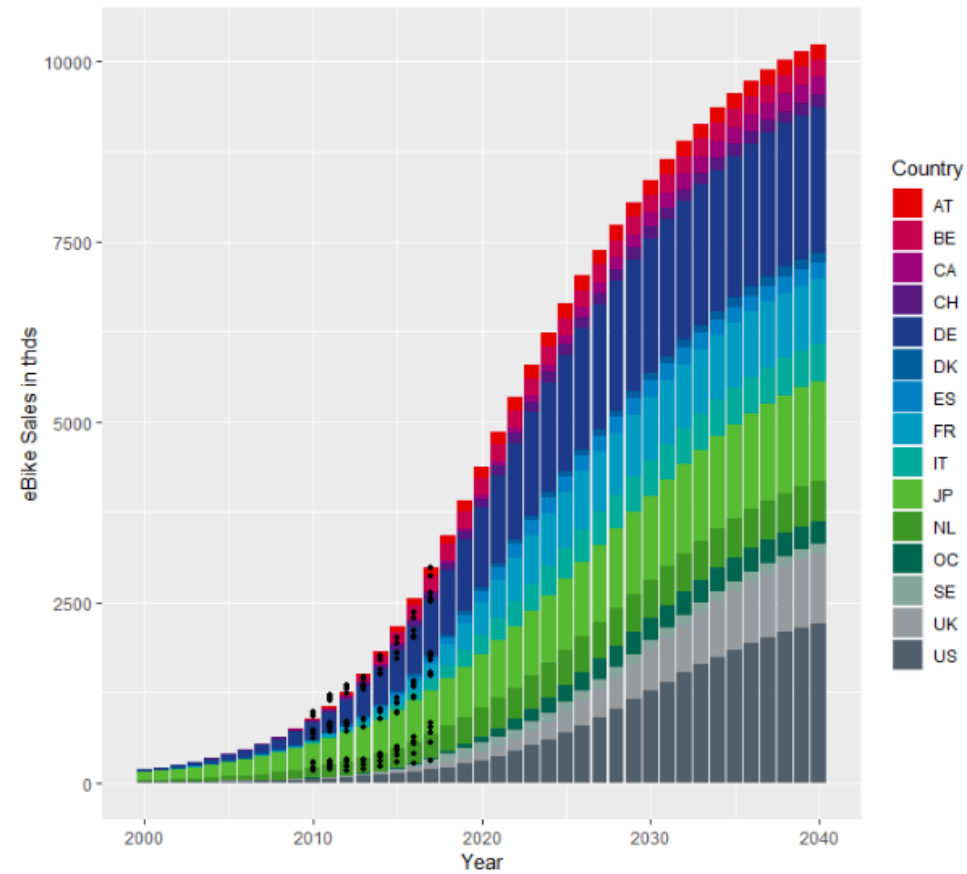
World Map Of MTB Participation



Alpine tourism products: expected trends by DMOs



Market Prediction



► Strong growth expected to remain

Quelle: Claus Fleischer, Bosch eBike Systems



Use the momentum

Initially Levi **must close** the gap to other regional or international MTB destination and at the same time offer entry level services to help grow the market. International benchmarks show that the destinations that managed to offer the best entry level offers, are economically most successful with largest visitor number and highest daily spending potential of each guest.

Levi is well positioned to be a national and International MTB destination with the implementation of some important infrastructure improvements. With several large and distinct players, like the Levi Ski Resort, Lapland Hotels and the municipality of Kittilä, cooperation and coordination are crucial between these entities.

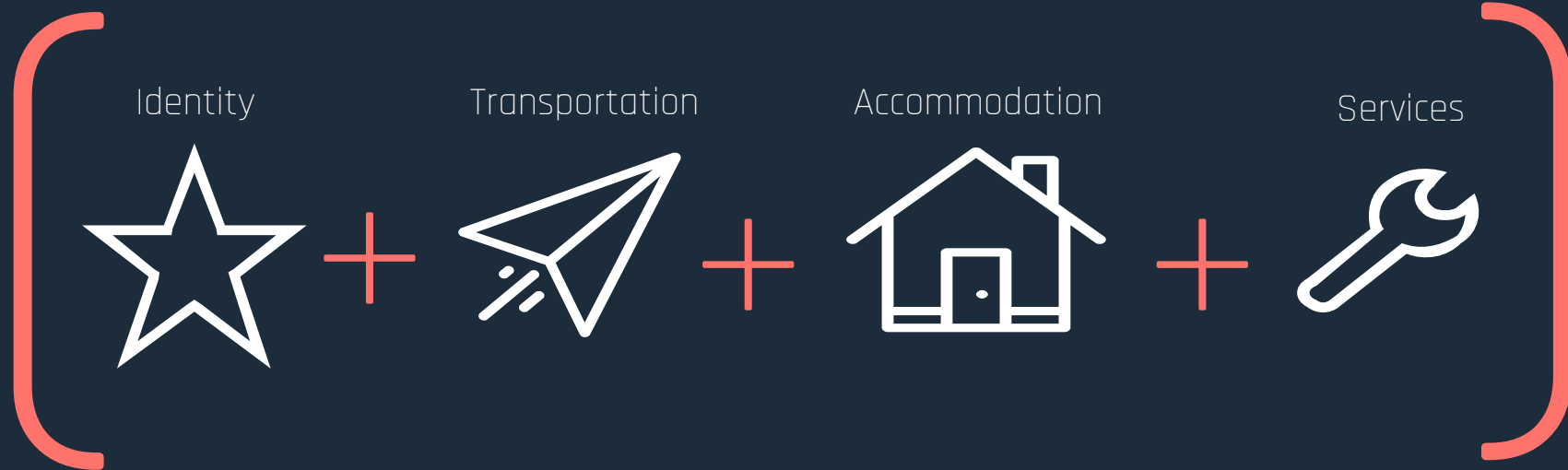
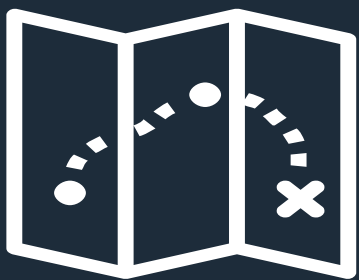
Eventually in five years' time, after closing the gap, and catching up to resorts like the Bike Republic Sölden, Levi must out-perform the current industry leaders.

Based on many meetings with international mtb and cycling tour operators and FAM organized September, there is a significant potential in Western Lapland to develop and sell products. But this needs new way of co-operation, clear strategy and pushing between Levi/Kittilä, Ylläs/Kolari and Olos-Pallas/Muonio areas and companies. That is the only way to success.



EXPERIENCE / USP

TRAILS



Identity

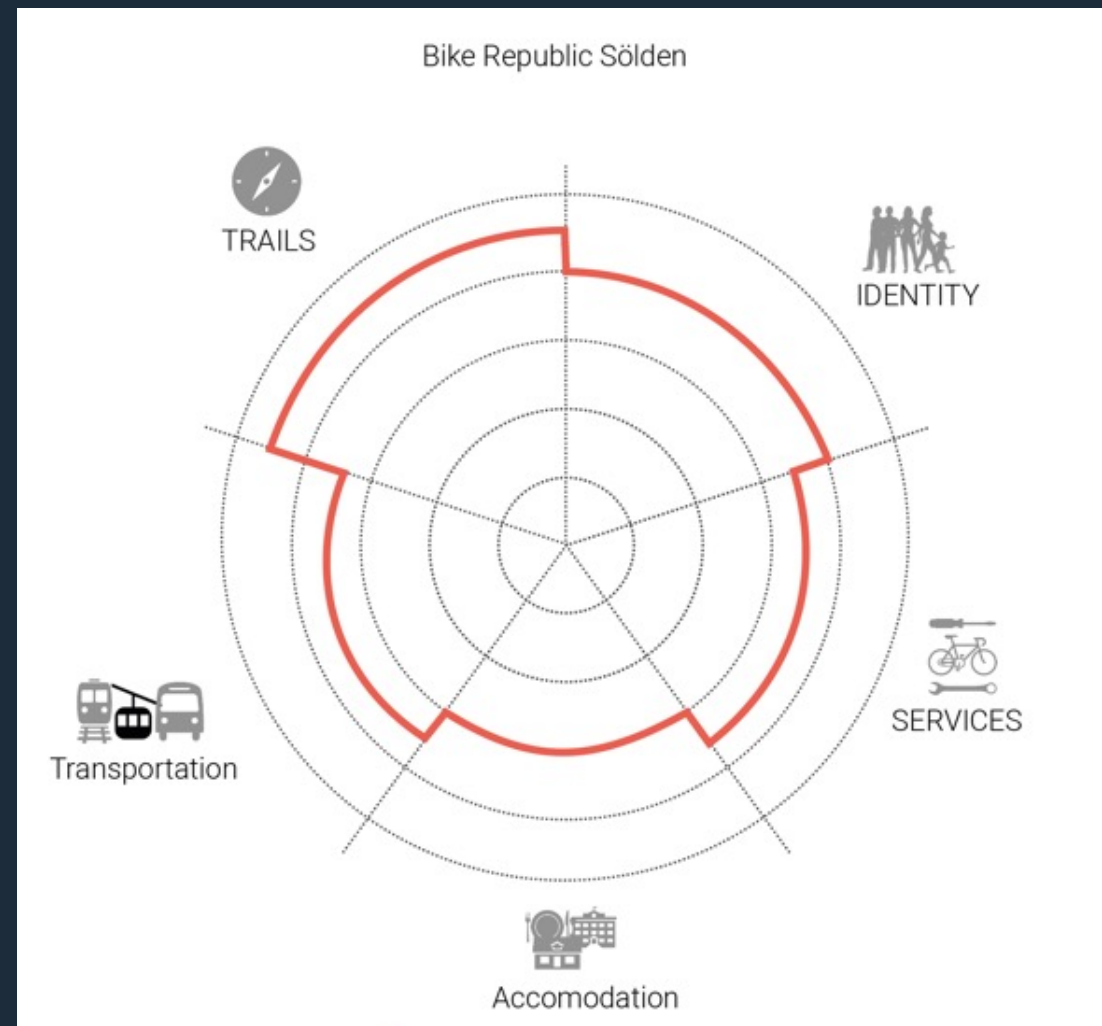
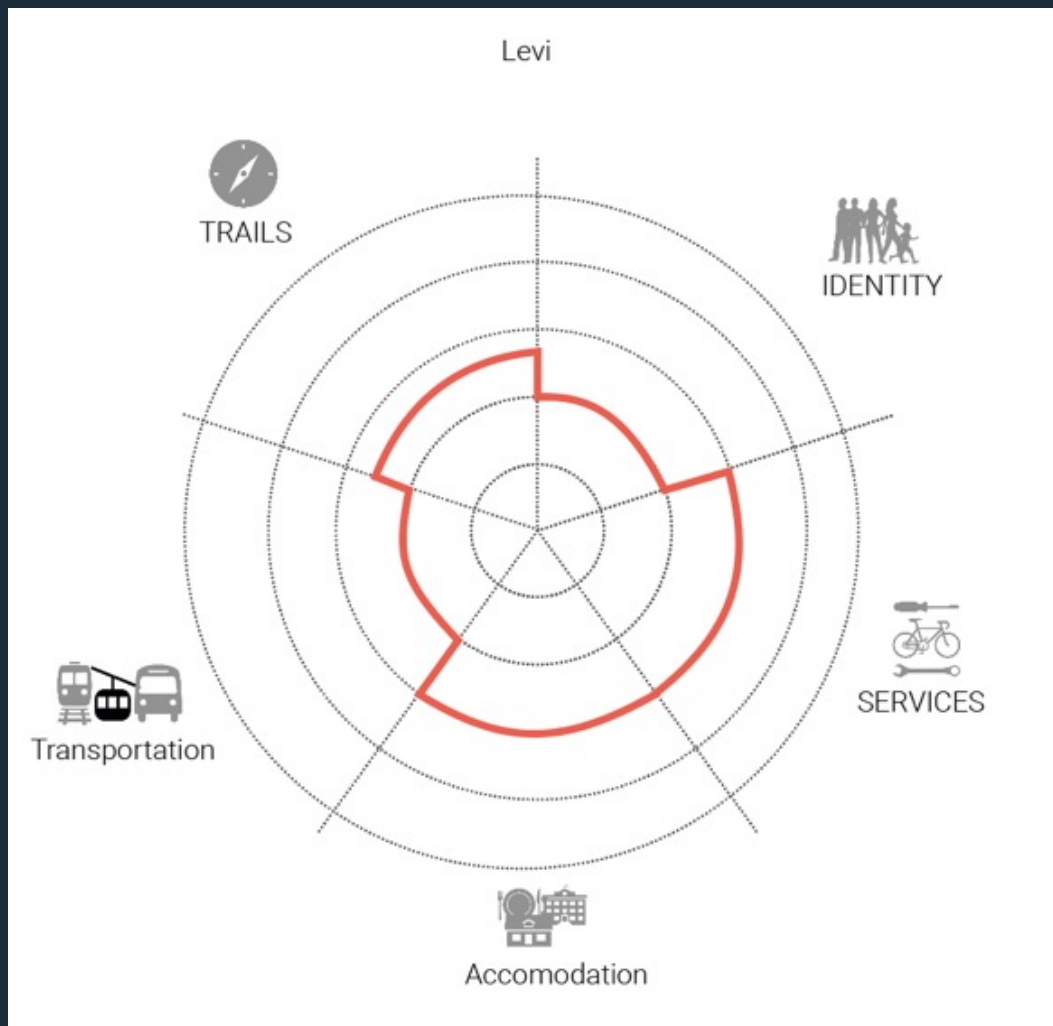
Transportation

Accommodation

Services



Current status as per assessment in October 2022:





Identity:

To successfully develop an MTB destination a common identity is the foundation. In Sölden for example the identity of the "Bike Republic" or in Lenzerheide the "Bike Kingdom" is a marketing strategy on the external side and a common mission on the internal side.

But developing a common identity can be as simple as setting few goals for all stakeholders, like raising the number of MTB visitors certain number by 2025 or creating common values and standards.

Currently such a common identity is missing in Levi.

The biggest challenge seems to be lack of communication and co-operation with lift company Levi Ski Resort, Kittilä municipality and other stakeholders in the MTB development. Also the role on motivation of Visit Levi is not very clear in this theme.

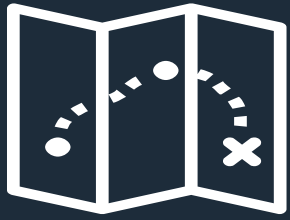


Accommodation and services:

Tourism infrastructure is really modern and up to date in Levi. There is definitely enough bed capacity and versatile activities in international MTB development point of view.

Obviously, in winter the services in Levi are really top in Europe and it is one the fastest growing destinations in Europe.

In summer and MTB, the development is still in early stage. Guiding is still mostly missing as that is the case everywhere in Finland. Levi could benefit from improved services, bike friendly accommodations, guiding and transportation with bikers in mind. These serve as the customer interface and allow for a quality connection with locals and helps to make for a memorable experience for the guest.

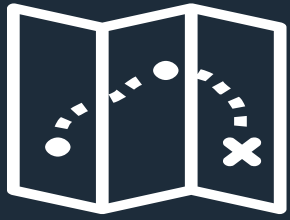


Trails

From experience with International Mountain bike destinations, trail systems need to be diverse, easy to navigate, and likely span across different land manager's lands.

Developing a consistent vision for where and how these trails will connect and how they can be developed to serve the varying interests of mountain bike tourists.

The combination of a good bike park with quality flow trails and a trail network around the forests and town is absolutely necessary.

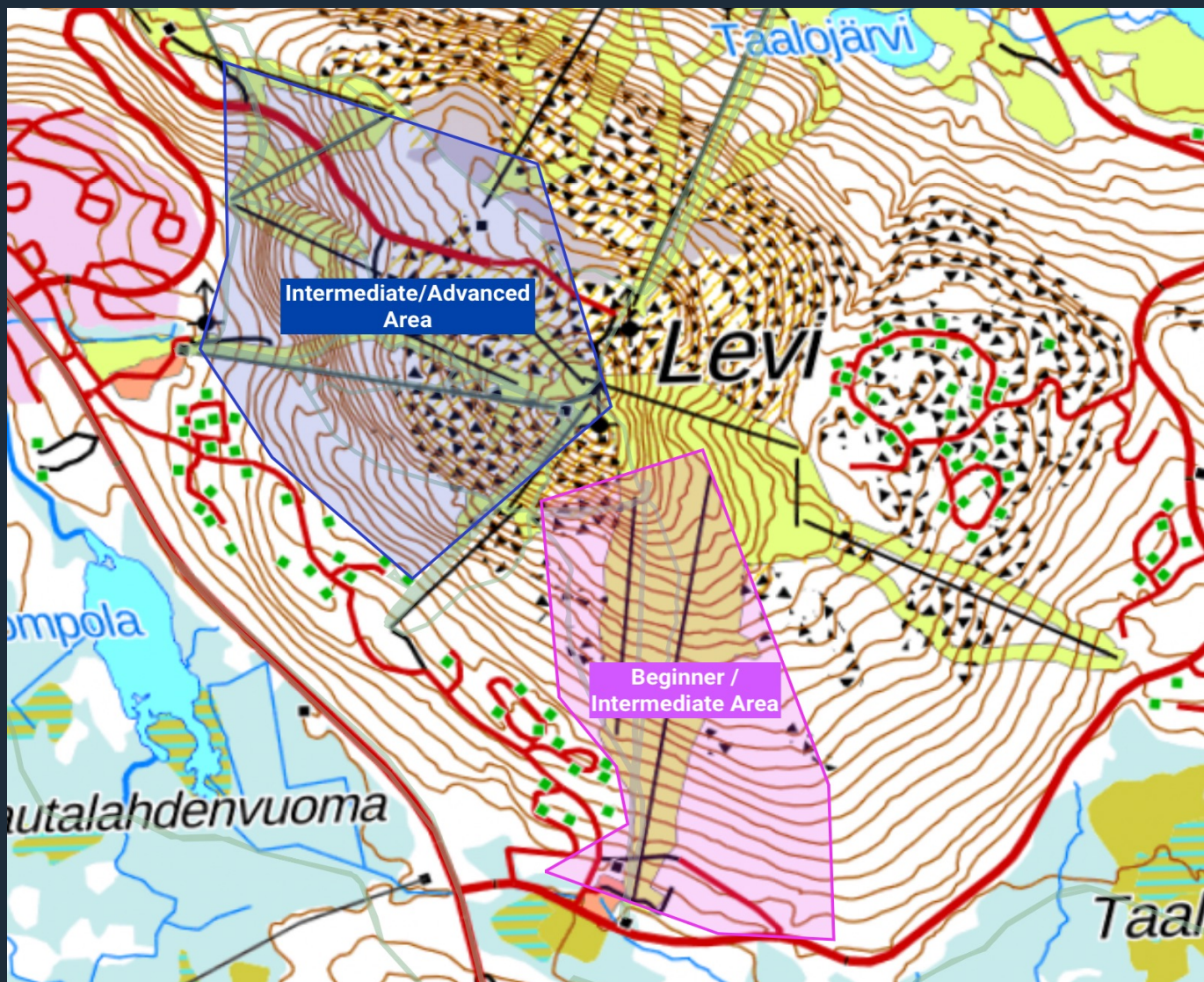
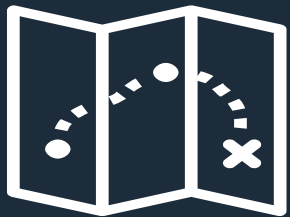


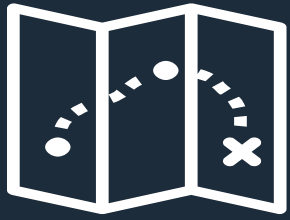
Levi Bike Park:

In September and October of 2022, Allegra/Klue had two international MTB experts visit the area to assess the state of trails and the existing trail offering of MTB in Levi.

Currently, the Levi bike park is the main MTB specific trail infrastructure in the area. With already existing ski resort infrastructure (Lifts, parking areas, restaurants, rental shops, etc.) , the Levi Bike Park should focus efforts on developing a more diverse trail system that suits both the existing (and growing) advanced riders, but also creates space for beginners and families.

With three possible base area options, there is significant MTB potential on Levitunturi for a variety of trail experiences and zones.

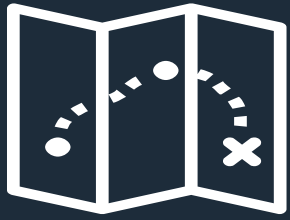




Currently, the Gondola base area supports the majority of the MTB focused infrastructure but due to the terrain challenges in this area, it is a difficult slope to add kids and beginner trails without feeling too congested. Along with the MTB infrastructure in this area, there is also a disc golf course, a ropes course, a skate park, and various children's playground implements. In this area, it seems that the MTB pump track is lost to the excess. At the base of the ski run in this area, there is also limited room for further development of kids and beginner trails.

Although this Gondola area is currently the focal point for summer lift operations, we feel that the south slope of Levi offers better terrain and potential for improving the development of beginner/family trail offering. By developing an area that creates a bit more separation from the more advanced trails, users will have an improved trail experience without interference of users of a different ability level.

Trails in this area are a great start to the offering but lack the organized and systematic feel required for international visitors. Current trails consist mostly of upper intermediate level and above trail experiences, which is a small fraction of the potential market. Trails also lack basic sustainability, which are important to reducing maintenance especially as user numbers grow.



Trails and trail planning in Kittilä municipality

Currently, there are not too many good and high quality trails in Kittilä and Levi area outside Levi Bike Park. There are some good segments yes, but the area is missing coherent mtb concept in both in domestic and international perspective.

Generally, this can be seen as missing link in product development both in international and domestic perspective.

There is a great potential in mtb trails in Kittilä and Levi area, but is there real commitment and motivation in Kittilä municipality to develop MTB trails and support tourism services? There are several new trails planned and designed well. It seems that the first steps will be taken soon and those are very important steps, but just the beginning. As a remark, land ownerships are challenging in Kittilä and Levi, but for example there are over 900km's of snowmobile tracks and several hundred cross-country tracks designed and built.



What needs to be done?



Identity:

Identity – As a next step in winter 2022/23 a common identity should be developed with all interested stakeholders and local businesses. Defining common goals, target groups, standards, services and quality levels, vision and individual commitments is the key to success.

MTB "culture centers" – It would be important to develop separate "MTB Chill Zone" and parking area for enthusiast riders to create their own scene. This should be close to services (parking, bike shop and rental, café/bar/restaurant), have a pump track at a core feature, and encourage a "see-and-be-scene" attitude.

Overall, internal communication needs to be improved.



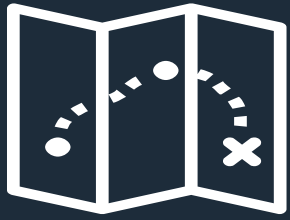
Accommodation and services:

Education of accommodation providers the need of mtb or cycling tourists, international perspective. Development and implementation Cycling Accommodation Standard (or Welcome Cyclist by Bikeland).

In the Bike Park a hook simulator at base (similar to Sölden) would help riders practice before getting to the lift.

In general, there is a lack of public transportation services. Due to the dispersed nature of the base area amenities, a local bus or MTB bus is an important part of the summer tourism offering in Levi.





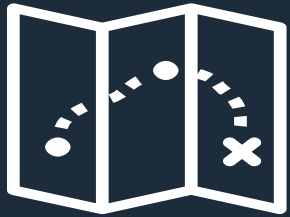
Trails outside the bike park and Kittilä Municipality

Trails on municipality land are vital in the development of an international MTB destinations. Mountain bike enthusiasts' range in their interests and many prefer riding that is less gravity focused than the trails in a bike park.

This segment of rider seeks more "XC style" trails, like the difference between Alpine skiing and XC skiing, these riders are looking for singletrack trails with flow, play, and challenge, but in a lower consequence and more natural environment. These riders will bring tourism dollars to the area through bike rentals, hotel stays, and general visitor spending and will likely spend a few days in the bike park if the trail meet their needs.

XC trails can be a dense network of interconnected trails or can be a larger network connecting various areas around a region. Depending on available land, connection points should be determined that provide singletrack connections to areas of dense accommodations, bike specific services, natural areas of interest, and transportation services. These trails should also be diverse in experience and difficulty, most trails can be "intermediate" but beginner and advanced trails should make up around 30% of this network.

Quality of trails within the XC system is extremely important. Sustainable trail building techniques are an integral part of the planning and development process and ensure the trails meet difficulty/experience standards but also environmental standards, which reduce long term maintenance needs. By engaging professionals from the beginning planning phase ensures long term success in creating a trail system that will be a community asset for locals and visitors.



A trail is not just a line through the forest. The trail is the main reason to travel for MTB tourists. It provides the main experiences the guest is seeking.

Quality trails define the MTB experience; it is impossible to have a mountain bike offer without them. It would be like trying to have an alpine ski offering with only 20 vertical meters or slopes with no snow: it cannot be competitive in the international market.

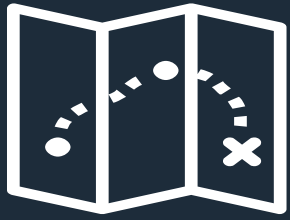
However, the term "trail" can be used too generally for recreation infrastructure that is anywhere from 0.5 - 10.0 meters wide. For the purposes of MTB use, trails are frequently referred to as "singletrack" because this provides a more accurate description of the experience that these users seek.



Good MTB trail experience



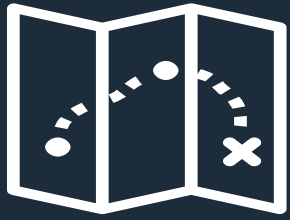
Not so good MTB trail experience



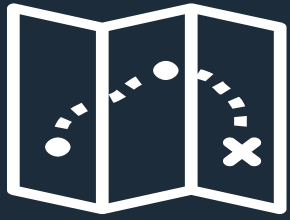
Levi Bike Park

The trails provide some good experiences for red riders but otherwise the offer is lacking. Overall, the system does not seem well-planned but more opportunistic and perhaps driven by the trail builders at a micro level. The system can be significantly improved by providing the following, consistent with the concept of making Levi the enthusiast rider's "must visit" destination.

- Better separation of rider skill – Overall, there should be clearer separation between skill levels: having a black trail come off a blue trail creates problems when the most-skilled riders share large portions of trail with riders just moving up from the green trails. Ideally, zones will be created based on skill level with progression from green > blue > red > black. This keeps riders from accidentally getting on a trail that is too difficult for them, reducing the likelihood of injuries.



- Green Play trail from mid-mountain – Many green riders are just getting into the sport and don't have the skill or fitness to ride from the top of the fell, especially if they are used to >100m hills in the south of Finland. A shorter trail built in gentle terrain will rapidly encourage progression, with an emphasis on Play and a tiny bit of Challenge through optional lines. The bottom of the run must be at the base as families need to access their cars more frequently than enthusiasts
- MTB Play and Challenge Zone at base – The base area should have a 1-2 hectare area in a piste that can be developed with green through red lines that allow practice. This area should be accessible from a magic carpet, and the mixing of skills will promote rapid progression, with younger green riders learning from watching and riding with older blue and red riders. Assuming that larger features cannot remain in the piste over the winter, the largest features should be placed in the woods adjacent to the piste, or removed and rebuilt every year. Large portable features can also be used, so as box jumps, drops, and ladders.
- Blue Challenge Trail – The trail network currently lacks a blue Challenge trail (it appears the South Route may have been that trail but it has been modified to a blue Play trail). Challenge does not just mean enduro-style tracks, either, so this trail should provide challenge features seen internationally, such as rock roll-downs, ladder bridges, drops into mixed terrain, rock armoring, etc., so that when Finnish riders travel to trails in North America and the Alps, they will be able to better enjoy their travels, further cementing Levi's reputation as the best training ground in Finland.



- Blue Play Jump practice trail – Jumping is a key skill for progressing in mountain biking. There should be a basic blue jump trail on the lower part of the mountain, placed in gentle terrain.
- Red Play jump/flow trail in easy terrain –This trail should be in gentle terrain and run only through the lower half of the mountain to better allow hotlaps. This will be a next-level trail with elements of slopestyle riding to encourage creativity in riding and should include optional black lines. Hips, hips into berms, transfers, step-ups, fade-aways, wall rides, ladder drops, etc, including at least one “banger” feature near the base that is highly photogenic and will be in every enthusiast rider's social media feed.
- More red enduro-style trails – As enduro-style riding will be a focus of Levi Bike Park, there needs to be a range of trails in this category including at least one signature red enduro trail. Developing more of these trails will also help achieve the Full-mountain enduro route (noted below).
- Full-mountain enduro route – To appeal to international riders, there should be an enduro-style “Around the Fell” loop that goes to various base locations and into town. Using primarily red Challenge trails, the loop can have a little bit of Adventure, Play, Nature, and Exercise, with some pedaling but with 80% of the vertical meters completed via lift. The route can use the paved paths and forest roads to get from town to trails but this should be >10% of the riding and be only for traversing and climbing, never descending. As a bonus, there should be an emphasis on Lapland culture and natural beauty, as this will be a mandatory “Nightless Night” ride and the highlight for any international guest. Some of this route is already in place.
- Timing stations – With an emphasis on training and racing for enthusiasts, the enduro tracks can be outfitted with timing sensors for highly accurate timing. The transponders can be rented for an additional fee at the rental shop and used by visitors to virtually compete with their friends and with the entire riding community at Levi Bike Park.



Community Collaboration

In the most successful MTB destinations, community collaboration has played a key role in success. When local lift operators, tour companies, municipalities, and land managers have open conversations on goals, ideas, and concerns of mountain biking in the area a vision can be created. This vision helps guide development in a way that best utilizes time, resources, and land. A trails committee can be a great way to build community collaboration and conversation, even if the committee only meets once a quarter, checking in on progress and hurdles keeps an open line of communication between stakeholders and allows other interested community members an opportunity to participate in the conversation.

A shared community vision helps to build stoke on the local level as well and is an excellent way to educate residents on how they can be involved in the process. Building a community of mountain bikers, strengthens a mountain bike destination and triggers new and unique entrepreneurship like guiding, skills instruction, mechanic, and transportation services. Channeling younger energy in the area will also help to create community ownership and a more sustainable long term development plan. Many resort communities are struggling to find employees, but the ones who keep employees around all year seem to retain employees with better success.



GAP

Identified GAP	Next Step	Timeline
Missing Identity, no common goals or visions, no official commitments	1) Develop MTB Tourism Business Model 2) Develop Common Identity w/ Vision 3) Get individual commitments from Stakeholders and companies	Winter 22/23
Consolidate MTB Trail System	A lot of planning and master planning has been undertaken in the past years. Yet no sustainable result is visible. Existing plans should be consolidated by a professional company.	Spring / Summer 23
Services, Accommodation, Identity	Develop an action plan how to improve services and accommodation for MTB guests.	Summer 23
Co-operation in Western Lapland and international packages	Build co-operation model with Ylläs/Kolari and Pallas-Olos/Muonio. This is needed for international MTB products, where riding experience will be 5-6 days.	Winter 22/23
International Promotion and Marketing	Build plan and strategy for international MTB and cycling tour operators and sales channels (+markets). Including eg. media, influencers, fam operations and for example possible event concepts.	Winter 22/23



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