

# Market potential for eco-mountain bike tourism in Kenya

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## **Abstract**

Kenya as a touristic destination is well known as an exotic country offering many different landscapes as well as the diversity of wildlife; this is typical for several African countries. To ensure a sustainable tourism development, different forms of tourism have to be considered. One of these forms could be eco-mountain bike cycling tours, as these tours are gaining in popularity, for example in Germany. The aim of this study was to obtain results regarding the market potential for mountain bike eco-tourism in Kenya. The up-and-coming tourism branch of mountain biking was examined in connection with the increasing demand for long-distance travel. The results of this study showed that mountain biking in exotic countries like Kenya has market potential in principle. However, it was also found that mountain biking alone is not a sufficient pull factor for tourists. The combination with other activities turned out to be promising. It was found that tourist packages that include mountain biking as an activity are perceived as attractive. Moreover, it was obtained that not only tourists who ride a mountain bike regularly are addressed as a target group. Even "regular" tourists find mountain biking an attractive (touristic) activity, especially in combination with game drives. Experts also assess the market potential for eco-mountain bike tourism as positive and find existing routes and accommodation attractive. The findings are giving indications for the possibilities to develop eco-mountain bike tourism as a touristic alternative and addition to existing touristic products.

**Key words:** Mountain Biking, Eco-Cycling, Kenya, Active Eco-Tourism in Emerging Tourism

## 1. Introduction

Mountain biking as a part of adventure tourism has experienced a great growth in recent years. Mountain biking (MTB) is not only a growing trend in Germany but also one of the most demanded sports to German tourists. In addition, mountain biking together with normal cycling is the second most popular sport in Germany (especially to the 40-59-year-olds by 40 %) (Statista a. , 2016). Also, at 25 %, it is the second most popular outdoor activity among German day tourists after hiking (54 %) (Statista b. , 2019). In 2019 there was a total of around 15.26 million people over the age of fourteen in Germany who rode mountain bike. 3.74 million even did so regularly. This means that around 21 % of the over 14-year-olds ride a mountain bike at least occasionally (Statista c. , 2019). Additionally, in 2019 there were around 62 million cycling excursions by Germans on holiday alone (Hofmann & Böhler, 2020). Bavaria (26.8 %) and Baden-Wuerttemberg (21 %) attract the most active MTB-vacationers. More often than other German states, foreign destinations (20.5 %) are now chosen by mountain bikers for their MTB-holidays (Deutsche Initiative Mountain bike DIMB e.V., 2010, p.6). Long-distance travel is also becoming more popular among German tourists. While 10.2 % took long-distance trips in 2009, this figure rose by 7 % within 10 years to 17.2 % of all holiday trips (Reinhardt, 2020, p. 14-20). This means that every sixth holiday trip taken by Germans is now a long-distance trip. Especially couples, singles and young adults take long-distance trips. Also, the average travel expenses per day have risen by €21 over the past 10 years to a total of €125 per day for long-distance travels (see *ibid.*). As a result of both mountain biking and long-distance travel becoming increasingly popular the relevance of investigating the relationship between the two areas is developing.

The aim of this study was to gather information about the survey-participants, their travel behaviour and willingness to explore new mountain bike destinations. Furthermore, it is to be found out which requirements the participants have for a possible long-distance trip including MTB and whether already existing MTB-tracks as well as typical accommodation in Kenya are considered attractive. The study focuses on the socio-demographic characteristics of the participants, the preferred mountain bike target regions and the attractiveness of existing MTB-tracks in Kenya. In addition to the requirements of mountain bikers for such a tourist product, information and needs of the non-mountain bikers should also be obtained. Finally, the expert assessment should provide further results about the marketability of such a product. In addition to further content analyses, such as information procurement and booking platforms, the average expenditure for mountain biking holidays on the one hand and long-distance travel including transport on the other hand was also determined. In summary, the aim of this study was to investigate the market potential in Germany for MTB-tourism in exotic countries like Kenya.

The study is structured as follows: First, the methodological procedure is described in more detail. Then the results are presented and analysed. In the following chapter, two established best-practice examples are being presented and explained. The last chapter is the conclusion, in which the essential results of this work are presented in a condensed form and which provides a final review in the form of an outlook for further action. Recommendations are also developed and presented within the last chapter.

## 2. Methodology

In principle, two types of data collection can be distinguished in empirical studies. These include qualitative and quantitative empirical research (Oehlrich, 2019, p. 84). While quantitative research aims particularly at achieving a large number of characteristic carriers on a high scale, qualitative research is characterized by the collection of qualitative data, for example through interviews (see *ibid.*). Due to the subjective character of qualitative research (e.g., through an interview), purely qualitative research in the sense of this paper could not be promoted. Moreover, the linking of both quantitative and qualitative approaches in the form of "mixed-method approaches" is becoming increasingly important (Wichmann, 2019, p. 2), which is why a mixed-method approach was used during this study. The central concern for qualitative research is to understand the phenomena in terms of the question "why" (Goldenstein, Hunoldt, & Walgenbach, 2018, p. 92). Qualitative research also serves to establish connections between constructs and to conceptualize and ultimately transfer these into theories (cf. *ibid.*). At the centre of qualitative research is the investigation of human experiences, i.e. the subjective experience of those affected (Ritschl, Weigl, & Stamm, 2016, p. 68). In contrast to a group interview or focus group interview, the expert interview is characterized by the high degree of expertise of the person(s) interviewed (Oehlrich, 2019, pp. 85-88). This was one of the main reasons why experts were interviewed in addition to tourists. Additionally, to get a deep insight in the according estimation of biking tour operators, destination managers and other mountain bike experts.

Since quantitative research usually has a deductive character, i.e., it tests theoretical causal relationships for their validity and transferability to the population on the basis of the research sample (Goldenstein, Hunoldt, & Walgenbach, 2018, p. 107), quantitative research in the form of a survey was chosen for a closer examination of the investigation of the central questions of this study. The survey is regarded as the most important method of primary data collection, which is why it was preferred to an observation or experiment as a basis (Oehlrich, 2019, p. 138). In addition, with little use of resources, larger line samples can be obtained than with other survey methods (Ritschl, Weigl, & Stamm, 2016, p. 161). According to this, the scientific knowledge that emerges from the survey aims to obtain generally valid statements for its area of activity (Ritschl, Weigl, & Stamm, 2016, p. 138). In order to do justice to the main criteria of quantitative research, the survey was drawn up taking into account objectivity, reliability and validity (see *ibid.*). The formulation of the question can be considered good if both semantics and pragmatics are understandable and plausible for the interviewee (Porst, 2019, p. 830). In order to meet this requirement, the questions were created according to the ten commandments of the question formulation according to Porst (2019). Accordingly, the questions must be easy, clear, comprehensible and not excessively long. Possible unclear terms were defined and explained to avoid ambiguity. Furthermore, care had to be taken not to influence the interviewee by asking specific questions and only to ask for already known information from the green-light interviewees. In order to investigate the attractiveness of MTB-tracks in exotic countries, the respondents were shown pictures with already existing tracks in Kenya. Furthermore, the participants were shown pictures of already existing accommodations but were not told yet which destination was involved in order to ensure the objectivity of the assessment. At a later stage it was explained that the pictures were taken in Kenya and Ghana respectively.

Hypothetical questions were asked sporadically in order to obtain an assessment of possible activities and sports that are possibly considered interesting in countries like Kenya. In addition, insinuations as well as double stimuli and negations were avoided when formulating the questions. Furthermore, the temporal reference of the questions was always made clear. Thus, for example, it was also possible to ask for an outlook with the question of measures to be taken in case of a new foundation. Last but not least, the answer categories were chosen in such a way that they did not overlap (pp. 831-839). As far as possible, the questionnaire was provided with closed questions in order to make the results comparable and to be able to evaluate them measurably. Since the answer categories may not correspond to the respondents' own selection, an additional answer category with an open answer option was provided for some questions (see *ibid.*). The resulting semi-open questions offered themselves because possible answers were known, but further possibilities were expected (Ebster & Stalzer, 2017, p. 203). Because the population of the study was too large for a total survey, a random sample survey was conducted in which a part of the population was interviewed, the results of which were transferred to the corresponding population (Ebster & Stalzer, 2017, pp. 175-179). The aim of the sample selection is to make statements about the population, which is why representative samples are understood as a reduced image of the population (see *ibid.*). For this purpose, the sample had to be selected in such a way that it corresponded to the characteristic values of the population to a high degree, because representativeness is dependent on the proportional representation of the characteristics according to their distribution in the population (see *ibid.*). For this purpose, a probabilistic selection procedure of the sample, i.e., a sampling procedure based on the random principle, was used (Goldenstein, Hunoldt, & Walgenbach, 2018, pp. 123-124). A simple random selection was used, in which a "blind" selection was made from all the objects of investigation according to the statistical random principle (cf. *ibid.*). The division of the survey into active mountain bikers and non-mountain bikers provides a differentiated view on the assessments. The study thus provides information about the attractiveness of accommodations and MTB-tracks for both experienced mountain bikers and non-mountain bikers, which can also represent a great potential. The survey was spread over the German Alpine Association, Mountain bike Tourism Forum and university networks. The expert survey was conducted at the MTB-Tourism Congress 2019.

### **3. Results**

#### **3.1. Tourist survey:**

A total of 279 people completed the online survey. The majority of the participants (97 %) are from Germany. 54 % of the participants are female while 46 % are male. The age of the participants is fairly evenly distributed with a majority of 21-30-year old's (47 %). The participants were distinguished into two different groups: the mountain bikers (n = 128) and the non-mountain bikers (n = 151). The group of the non-mountain bikers are characterized by never riding a mountain bike during a year, whereas people who ride a mountain bike less than 5 times a year are considered mountain bikers. All people who are riding a mountain bike regularly are among the mountain bikers as well.

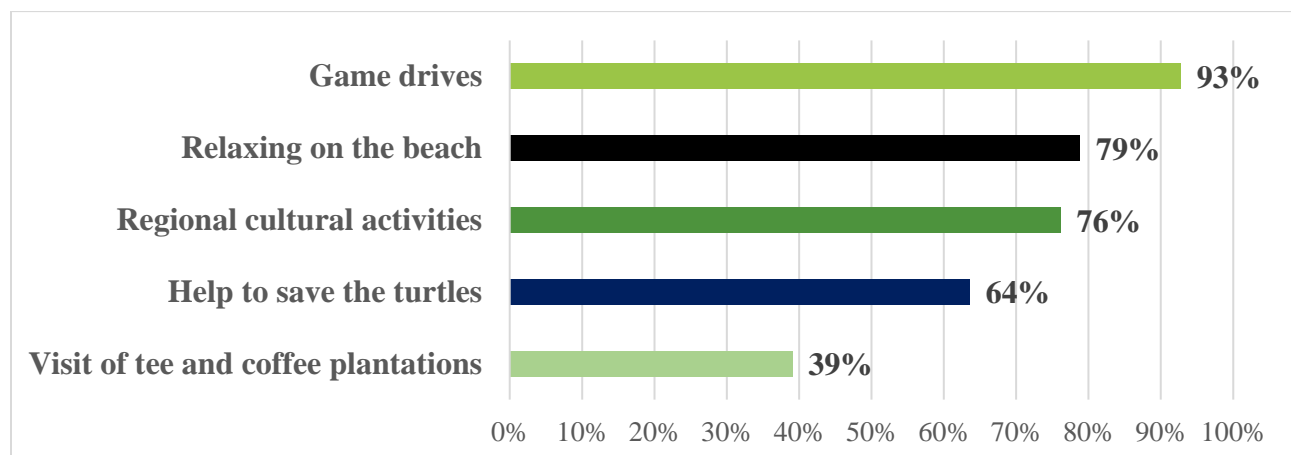
Most visited locations of MTB-holidays are Austria (72 %) Switzerland (35 %) and France (20 %) beside Germany (78 %). While 9 % of Mountain bikers are travelling by themselves, 52 % are travelling with friends and 36 % travel

with their family. Friends and family are also the main source of information about mountain bike destinations (68 %). Other sources of information about MTB-destinations are MTB-forum (43 %), -magazines (39 %) and -guidebooks (31 %). Overall, the Internet is the main source of information. In terms of organization, 84 % of mountain bikers organize their tours themselves rather than with a commercial guide (16 %). Mountain bikers seek an athletic challenge mostly when riding mountain bike (74 %). The second most important attribute for MTB-riding are the trail characteristics (37 %). Especially All mountain/Enduro is being preferred (50 %), followed by Touring trail characteristics (38 %). When it comes to discovering different destinations for MTB, mountain bikers are willing to try something new. 86 % agree, that they like to discover different destinations for MTB. They would also like to travel to destinations that are considered exotic from a mountain bike perspective (e.g., Asia, Africa) and to bike there (44 % agreed). Moreover, mountain bikers like to get in contact with locals when they are on their holidays (85 % agreed).

Beside the mountain bikers the non-mountain bikers were asked if they had ever ridden a mountain bike on their holidays. Almost one third (30 %) of the non-mountain bikers were already riding a mountain bike during their holidays which indicates that mountain biking is not only a sport for a specific group but also for “regular” tourists. According to the mountain bikers, non-mountain bikers could imagine riding MTB when travelling to an “exotic” destination (75 %).

In order to obtain assessments of the attractiveness of current MTB-tracks and accommodations, an image survey with actual African tracks and accommodation was conducted. Both mountain bikers and non-mountain bikers valued the tracks attractive regardless of the location, which was not known to the respondents at that time of the survey. After showing the participants the pictures of already existing MTB-tracks in Kenya, they were asked if they could imagine travelling to such countries to ride MTB there. While 26 % could not imagine making such a trip, 38 % would. The remaining 37 % would undertake such a trip only in combination with other activities such as regional cultural activities (76 %), Game drives (93 %) or relaxing on the beach (79 %) (see figure 1).

Figure 8: Interesting activities in exotic countries like Kenya

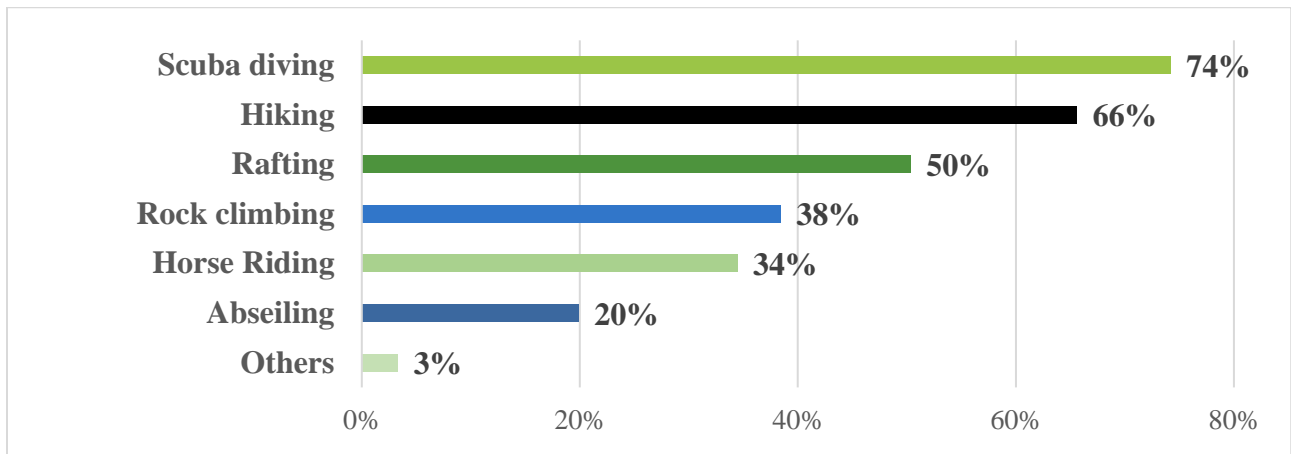


Reference: Own Results.

n = 151

Exotic activities, which are not possible in Germany, such as safaris or only under different conditions, such as relaxing on the beach, were mentioned particularly frequently. Furthermore, the participants would combine such a holiday with other sport activities e.g., scuba diving (74 %), hiking (66 %) or rafting (50. %) (see figure 2).

Figure 9: Interesting sports in exotic countries like Kenya

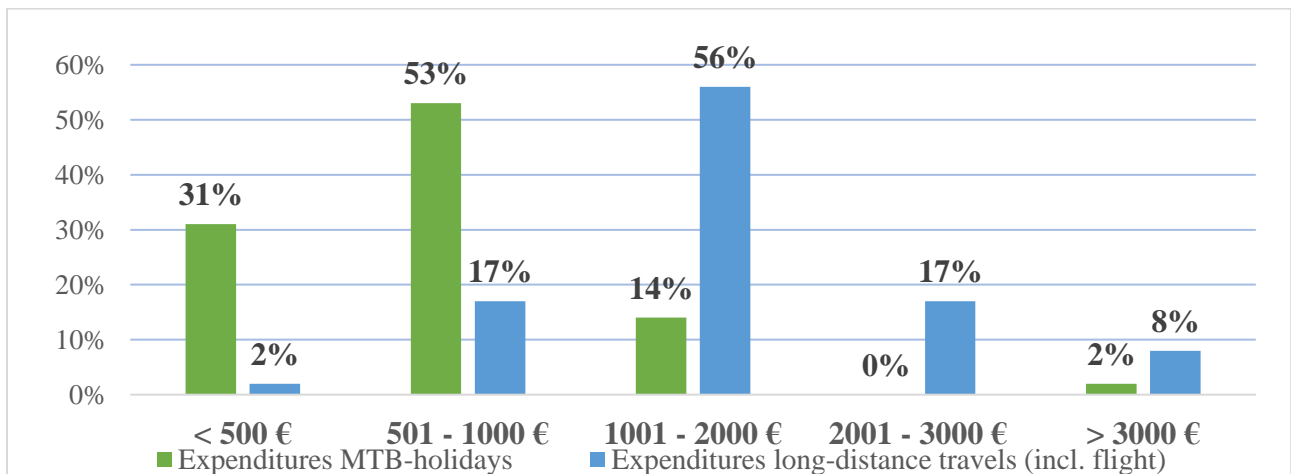


Reference: Own Results.

n = 151

In order to get an estimation of the price range for a touristic product including MTB, the average expenditure for both mountain bike holidays, and long-distance travel was examined (see figure 3). This provides information about a possible price range for such a product.

Figure 10: Expenditures per person for a holiday



Reference: Own Results.

n = 128

Most mountain bikers spend between 501-1000 € per person for a MTB-holiday, whereas most people spend between 1001-2000 € per person for a long-distance travel (incl. flight) (see figure 3). This shows an approximate value that the mountain biker is willing to pay for mountain biking holidays in non-exotic areas. As he spends on average considerably more on long-distance trips, a tourist product that includes mountain biking can accordingly be set within a higher price range.

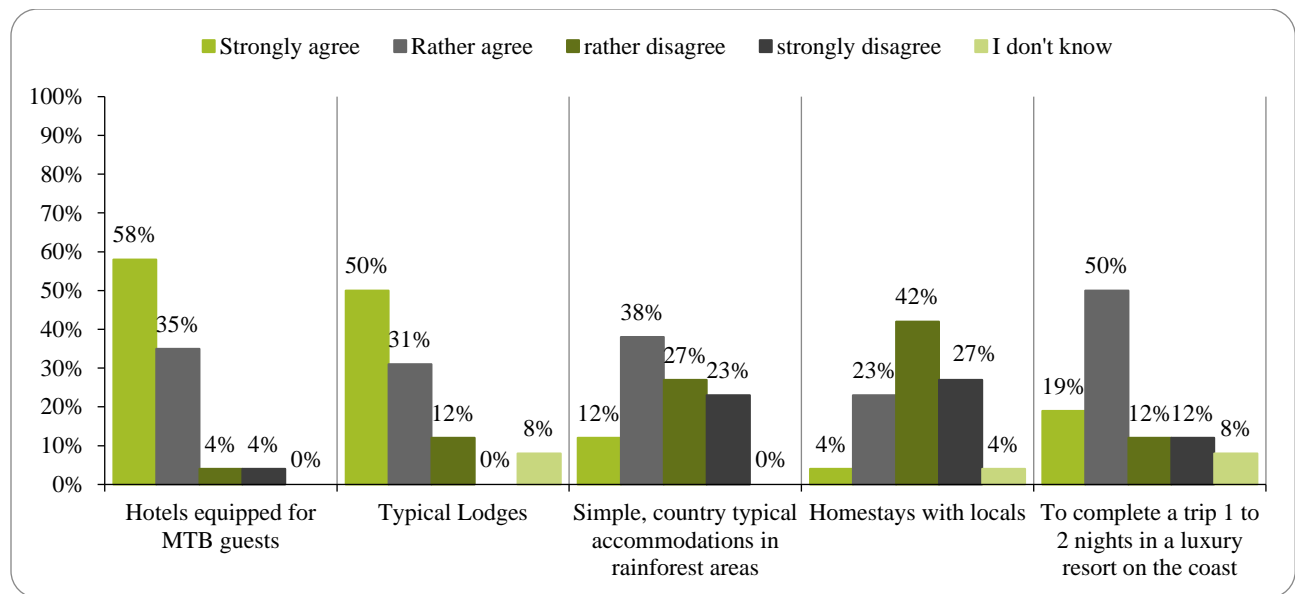
### **3.2. Expert survey:**

Following the tourism survey, an additional expert survey was conducted to provide a differentiated assessment. 26 experts completed the survey at the annual German and Austrian mountain bike conference in May 2019. More than half of all experts work in tourism- and destination management (54 %). Tourism consulting was also mentioned often as a profession of the experts (23 %).

85 % of the experts agreed that a diversified MTB trail network makes a mountain bike destination attractive. They also consider the possibility to do other activities as important as self-organized biking and good accessibility of the destination (each 62 %). The safety of the MTB-track (35 %) seems less important than the safety of the travel area (46 %). As well as the mountain bikers indicated, the experts estimated that Touring (88 %) and Allmountain/Enduro (62 %) are the most suitable target groups for mountain biking in a country like Kenya. In addition, they estimated the potential of German mountain bikers to travel to exotic countries like Kenya to bike there at 32.15 % on average. What seems to be little at first turns out to be a great potential considering the number of mountain bikers in Germany. Nevertheless, most experts do not see mountain biking as the main reason for travelling to an exotic country like Kenya (15 % do so). In fact, the experts see the potential in combining such a trip with other activities to become an attractive destination for mountain biking (69 %). Such activities correspond to those shown in figure 1 & 2 listed possibilities.

In order to meet the mountain bikers needs of an accommodation the accommodation doesn't necessarily need to be a hotel especially equipped for mountain bike guests. Although more than 90 % agree that such accommodation would be suitable, typical lodges for mountain bikers seem to be sufficient as well (see figure 4). However, the condition is that the accommodations are suitable for mountain bikes and the corresponding equipment.

Figure 11: Preferred accommodation during a MTB-holiday in exotic countries like Kenya



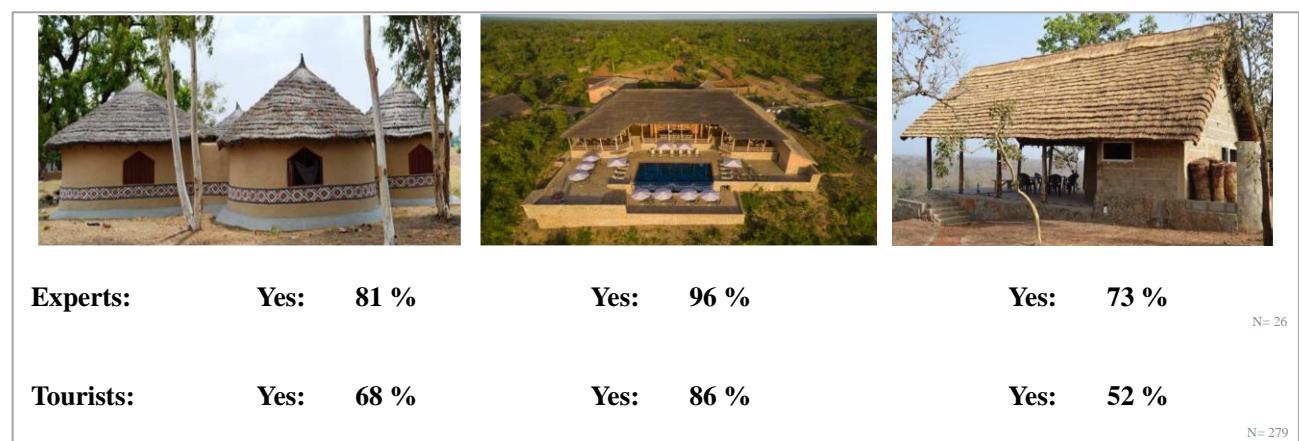
Reference: Own Results.

n = 26

Also convincing seems to be a two-night stay in a luxurious accommodation near the coast at the end of a holiday (see figure 4).

As the following pictures show, both the experts and the tourists are seemingly liking the already existing accommodations (see figure 5). It can be seen that more luxurious accommodation is preferred to "simple" accommodation. Nonetheless all pictures are being attractive to at least 50 % of the experts as well as the tourists.

Figure 12: Attractive accommodations – comparison



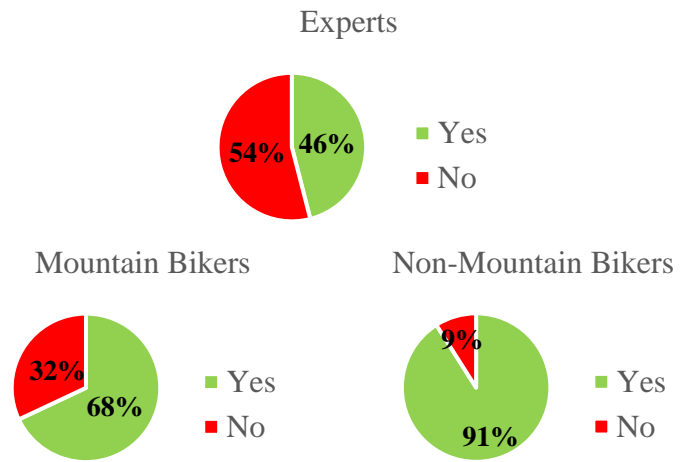
Reference: Own Results.

In addition, the experts agreed that mountain bike tourists are likely to complete such a trip in a luxury resort on the coast (see figure 5). Accordingly, the attractiveness of the middle picture was highest as it seems most luxurious.



Like the tourists, the experts also evaluated the already existing mountain bike routes with regard to their attractiveness. As well as the tourists indicated, there was a high level of approval regarding the attractiveness of the existing tracks. The following two pictures show the comparison of the evaluation of the mountain bikers, the non-mountain bikers and the experts (see figure 6 & 7).

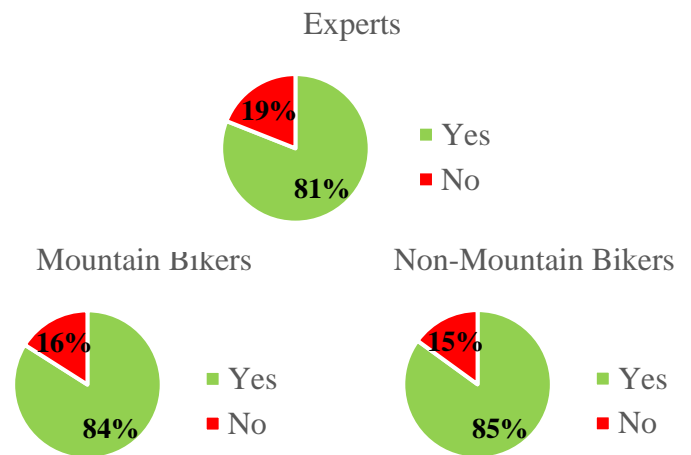
Figure 13: Attractiveness of MTB-track 1



Reference: Own Results.

The majority of participants (over 60 %) found the track of figure 6 attractive. Only the experts consider this route not particularly attractive for mountain bikers. While mountain bikers prefer higher and steeper tracks, non-mountain bikers tend to prefer relatively flat tracks according to the pictures shown to the participants. Furthermore, all pictures shown seemed to be attractive to the participants.

Figure 14: Attractiveness of MTB-track 2



Reference: Own Results.

All parties agreed that narrow tracks are more attractive for mountain biking rather than wide tracks. More than 80 % of both the experts such as the tourists found the track of figure 7 attractive. They find this track more attractive than the track of figure 6 probably because of its width. This picture especially shows the high interest of both mountain bikers and non-mountain bikers as well as the high estimation of attractiveness of the experts. It also indicates that no special measures need to be taken in order to build such tracks.

Overall, there was a high level of agreement regarding the already existing tracks. Furthermore, there seems to be a great market potential, as a certain part of the participants would be willing to make a trip to Kenya and ride mountain bikes just on the basis of a few pictures. Especially the possibility to combine mountain biking with other activities and sports within such a holiday shows great interest of the tourists and the experts as well.

#### 4. Best practice

As the previous results showed, mountain biking has great market potential as a tourist product and can be successfully implemented in exotic countries like Kenya. It also became clear that mountain biking as a sole pull-factor is not sufficient to make such a journey as a tourist. However, mountain biking seems to be an extremely promising activity in exotic countries. Successful examples can already be found in parts of Africa. South Africa in particular already has some of these offers. iSimangaliso Wetland Park (RSA) is one of the companies offering such adventurous MTB-experiences in South Africa. Riding with a mountain bike through the World Heritage Site of the iSimangaliso Wetland Park, tourists not only experience riding a mountain bike in different landscapes but with different animals surrounding them. The park operators use the natural tracks, which are etched in the soil by hippo's and antelope's footprints, the "nature's most accomplished trail designers". (iSimangaliso Wetland Park, 2020). Tourists can



mountain bike through a World Heritage Site that transverses eight interlinking ecosystems and can "see a rhino and elephant in one day, followed by whales the next" (see *ibid.*). iSimangaliso Wetland Park is offering a touristic product which can easily be booked through their website. The entrance fee assists in monitoring, protecting and

reintroducing animals into the park. This allows tourists to experience a safari on a mountain bike tour while conserving resources and supporting wildlife. Such a tour is led by a tour guide and thus ensures the safety of both the tourists and the animals.

Manyoni private game reserve also offers a special event regarding mountain biking within a wildlife reserve. There is a so called "Rhino Ride" where the poaching of Rhinos is pointed out. Furthermore, money will be collected for the fight against poachers. This event is held annually since 2013. Tourists also have the possibility to take a guided tour through the reserve and have the chance to see the "Big 5". In addition, game drives can be booked and attract not only mountain bikers but also "regular" tourists (Manyoni Private Game Reserve, 2020).

These best practices are indicating that mountain biking is already successfully used as a touristic product in Africa and enjoys great popularity and demand using relatively simple ways of implementing such a product.

## **5. Conclusions and Recommendations**

The results of the study indicated that there is an apparent market potential for mountain bike tourism in exotic countries like Kenya. Mountain bikers as well as non-mountain bikers showed that they like to go mountain biking during their holidays. Furthermore, almost one in three non-mountain bikers has already ridden a mountain bike while on vacation. Consequently, mountain biking does not only appeal to mountain bikers themselves but can also be considered an interesting activity for "regular" tourists. As the photo survey showed, the mountain bikers, the non-mountain bikers as well as the experts consider the already existing MTB-tracks attractive. The accommodation that would be suitable for such a trip seems to convince the respondents, too. However, it can be stated that the German tourist prefers more comfortable and modern accommodation to "simple huts". Nevertheless, typical African lodgings are an attractive form of accommodation during a mountain bike holiday. Already existing MTB-tracks such as accommodations were valued as attractive, showing that new tracks and hotels do not necessarily need to be built in order to attract tourists from Germany.

Although mountain bikers like to ride on their own, for the protection of both animals and inexperienced tourists, secure tours should be offered, optionally with a tour guide. Furthermore, the participants showed a high need for safety both for the mountain bike route and especially for the destination, which should be taken into account. In addition, the experts consider Enduro/All mountain or Tour trail-characteristics to be a particularly suitable form of mountain biking for exotic countries. Moreover, narrow tracks are being preferred to wide tracks. Due to the fact that Kenya is not yet known for mountain biking, experts say that 15 % of the people would travel to Kenya to go mountain biking based on the pictures shown. However, the overwhelming majority of the experts considered such a touristic product to be successful only in combination with other activities. Additionally, a majority of mountain bikers would travel to Kenya to mountain bike, but also only in combination with other country-specific and sporting activities. These activities include, in particular, game drives, relaxing on the beach and cultural activities, as well as sporting activities such as scuba diving, hiking and rafting. The best practice examples also successfully combined some activities. Especially the combination of mountain biking and game drives already shows great potential. If

other country-specific and sporting activities will be added to the portfolio of exotic destinations, there seems to be great potential to establish a successful tourism product in the European market.

In summary it can be concluded that MTB-tours in exotic African countries like Kenya can be an attractive way to spend a holiday. However, in order to obtain a product that is successful on the market, the combination with other country-specific activities and other sports is important, as mountain biking is probably not sufficient as the main reason for a long-distance trip. For this reason, tourist packages including eco-MTB-tours can be successful on the market and should therefore be focused.

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**Dr David Rempel** is a Professor at the IUBH University of Applied Sciences, Germany. His focus has been in Tourism and Entrepreneurship; his research interests include various Entrepreneurship Topics and Talent Development. He is not only involved in raising awareness of volunteer components in tourism development especially in the African context but also in coaching and preparing students for entrepreneurial ventures and involved in setting up Start-Up Camps both within and beyond the IUBH setting. David has been involved in numerous projects with foster entrepreneurial and talent development, assisting in organizing conferences, chairing conferences tracks and presenting. Dr Rempel is presently acting as the Africa Coordinator in the Global Talent Mentoring Hub program from the World Giftedness Centre, working with various African Universities and Partners to foster talent development in the STEMM (Sciences, Technology, Engineering, Maths and Medicine) areas. He is a member of ECHA (European Council of High Ability). He received his PhD (Talent Development) from Friedrich Alexander University, Germany, Masters (Leadership Studies) at Azusa Pacific University, CA., USA, and his two undergraduate degrees (B.Ed, B.A.) from the University of Winnipeg, Canada.

**Vanessa Mertl** is currently pursuing her Masters in Kufstein, Austria, after doing her Bachelors in Hotel Management at IUBH, German. Her passion includes the hospitality industry, with over 5 years of experience and is involved in start-up with social impact. She has been involved in various research projects, including a research excursion on sustainable tourism in Kenya, the findings of which were presented at the University of Nairobi in the context of German African Entrepreneurship conference.

**Marcel Kremser (B.A.)** has completed his dual bachelor's degree in tourism economics in April of 2020 at the IUBH International University of Applied Sciences (Campus Düsseldorf). In addition to his bachelor's degree, Mr. Kremser has also been involved in several extracurricular research projects. Within his research in sustainable tourism in Africa, he went on a study tour to Kenya in 2019 to participate as a speaker at the conference "Sustainable Tourism



Development in Kenya for the German Source Market" in cooperation with MCF. Furthermore, Mr. Kremser, in cooperation with Prof. Dr. Wölfle, presented the results of their research project on mountain bike tourism at two international congresses. Currently, Mr. Kremser is studying Entrepreneurship and SME-Management in the master's program at the University of Siegen and is expected to graduate in September 2022.

**Prof. Dr. Felix Wölfle** is Professor for Tourism Management at IUBH International University of Applied Science since 2017. Prior to that, he worked as tourism consultant, specialized for destination management and Outdoor and Sports Tourism. He studied Science of Sports at the German Sports University in Cologne, where he also worked for 7 years as research assistant and did his doctoral studies. His research activities are focused on Sports and Outdoor Tourism like Mountain biking, Trekking, Skiing and Hiking. The research projects take place in several regions in Germany like Sauerland, Schwarzwald, Thüringer Wald and Eifel as well as in different countries in Africa like Ghana and Kenya. The projects mainly focus on economic impacts and visitor management aspects. Also, his experience in Outdoor and Sports Tourism is in demand on initiatives from the German Government like the report of vulnerability to climate change.