

FORESTRY COMMISSION SCOTLAND

**AN AMBITION FOR FOREST CYCLING AND MOUNTAIN BIKING
TOWARDS A NATIONAL STRATEGY**

Final Report

December 2005

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23rd December 2005

Dear Fiona

**AN AMBITION FOR FOREST CYCLING AND MOUNTAIN BIKING
TOWARDS A NATIONAL STRATEGY**

We have pleasure in submitting An Ambition for Forest Cycling and Mountain Biking Towards a National Strategy for Forestry Commission Scotland (FCS).

The content of this report has been conscientiously prepared on the basis of our research and information provided to us by various sources at the time of our study. The report also includes and makes reference to each of our previous regional forest cycling research studies – their conclusions have been echoed in this framework document.

An action plan framework which pulls together a number of recommended actions is presented as a standalone summary document as an Appendix to the main report. The document also includes a full economic appraisal, also presented within the Appendices.

This report has been prepared for sole use by the study sponsors. It sets out an ambition and a basis to FCS developing their own strategic response to this framework.

We have welcomed the opportunity of working with you and preparing this report.

Yours sincerely

A handwritten signature in blue ink, consisting of several overlapping loops and a long horizontal stroke.

David G. Bullough
Associate Director

Ref: DGB/MTM/JMc/0654-R1

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EXECUTIVE SUMMARY

1 INTRODUCTION

Forestry Commission Scotland (FCS) commissioned Tourism Resources Company (TRC) to prepare a research framework – an ambition towards a strategy for the management, development and sustainability of cycling facilities on the National Forest Estate in Scotland. The preparation of a Forest Cycling and Mountain Biking National Strategy will be an important facet of FCS' wider recreational strategy / direction. A Scotland-wide geographic / market and economic assessment of FCS forest cycling developments has been undertaken by TRC in the last 18 months. This detailed research, at Forest District level, together with a focussed approach to this research study, forms the basis of this framework document.

This framework document (the ambition) aims to build on the successes of the 7stanes mountain bike developments in Southern Scotland and the enthusiasm and impetus created by the World Cup Downhill, Cross-Country and 4-Cross events held at Fort William over the last four years.

The role of this framework is to give FCS a market-led approach to future product development. It is to ensure that future product development satisfies the needs and expectations of existing markets and develops new and emerging markets particularly novices, families, women and older cyclists re ensuring future sustainability. This framework document is also responding to demand created locally by clubs and enthusiasts and focuses on social inclusion, health and learning opportunities.

In order to widen and grow the market and produce better targeted facilities, new products were suggested at a regional / community level and these Forest District documents have been echoed in this framework.

A re-branding and developing of the more 'traditional' forest cycle products has been suggested in order to widen the market base, under the working title of Epic brands aimed more at the leisure, family, novice, adventure and sightseeing visitor markets.

FCS has a number of cycle products which in the future should be largely grouped under two headings:

- Forest Cycling - 'Traditional' signed forest road loops and 'out and back' routes – linking to a network of Sustrans and other local routes, as well as other forms of forest recreation and visitor destinations;
- Mountain Biking - A network of high quality purpose-built facilities across Scotland – linked to forest cycling and local communities and visitor destinations.

The anticipated outcomes of the Forest Cycling and Mountain Biking National Strategy are summarised as follows:

- Creating more wealth and jobs for Scotland's rural areas in particular;
- Promoting a positive image of the role of a modern FCS;
- Enhancing the quality of life and health of Scotland's communities;
- Using recreation and cycling to attract greater visitor access, to promote a greater appreciation of Scotland's forest and woodland assets;
- Attracting more visitors from outside Scotland to visit forests, as part of their Scottish short break experience;
- Encouraging more Scottish residents (particularly those in the Central Belt) to utilise forests for cycling;
- Creating and sustaining a high quality, well managed, world-class cycling product;
- Increasing visitor expenditure, length of stay and out of season visits.

2 STRATEGIC FRAMEWORK

In order to achieve these outcomes, a 'world-class' product must be developed, the future Strategy therefore calls for a vision. In order to maximise the potential, the approach must be aimed to satisfy visitors with a choice of high quality cycling facilities linked to other recreational experiences and tourism destinations around Scotland.

The Vision

“to create an accessible national network of world-class sustainable forest cycling and mountain biking products. These products must promote health, enjoyment and wellbeing for local residents and tourist visitors, whilst maximising economic potential for Scotland and its communities.”

In addition, there is also a need for a strategic framework which will help to deliver a uniformity of approach to ensure product quality, trail sustainability, management / maintenance, safety, visitor communication / interpretation etc. The product range however must still have distinctive local community and regional identities.

The framework has adopted the following principles to guide its strategic aims, objectives, policies and actions:

(i) Sustainability

In terms of cycling, sustainability refers to trail development and its ongoing maintenance and management, sustainability of market demand and economic benefit. High standards in environmental responsibility, awareness and sustainable tourism / visitor development should be ensured.

(ii) Access for All

A cycle resource which is accessible to the widest possible range of markets and promotes fun, confidence, health, wellbeing and quality of life for Scotland, its residents and visitors.

(iii) Market Awareness

The right range of cycle products must be offered at the right quality and skill level to satisfy visitor expectations in relevant cycle market segments. An understanding of visitor segmentation and their requirements is necessary.

(iv) Integrated Destination Resource

Visitors visit destinations. Forest cycling must be viewed as an integral part of a wider tourist destination as well as a forest recreational offering. The positioning and development of a cycling product must be integral to other wider forest recreation facilities and activities.

(v) Prosperity, Wealth and Community

A key benefit of forest cycling and mountain biking is economic 'spin-off', attracting visitors and tourists to spend in the wider area. Forest cycling can create local business opportunities. In many instances forest cycling is also an important resource for a community's youth, improving social wellbeing / health and promoting confidence and belonging.

(vi) Affordability

Future development must be at a pace which FCS and its partners can afford. A clear focus of a strategy where future funding is constrained should be to complete existing sites before progressing to new developments. This approach needs to be balanced against the cost benefit at a national level.

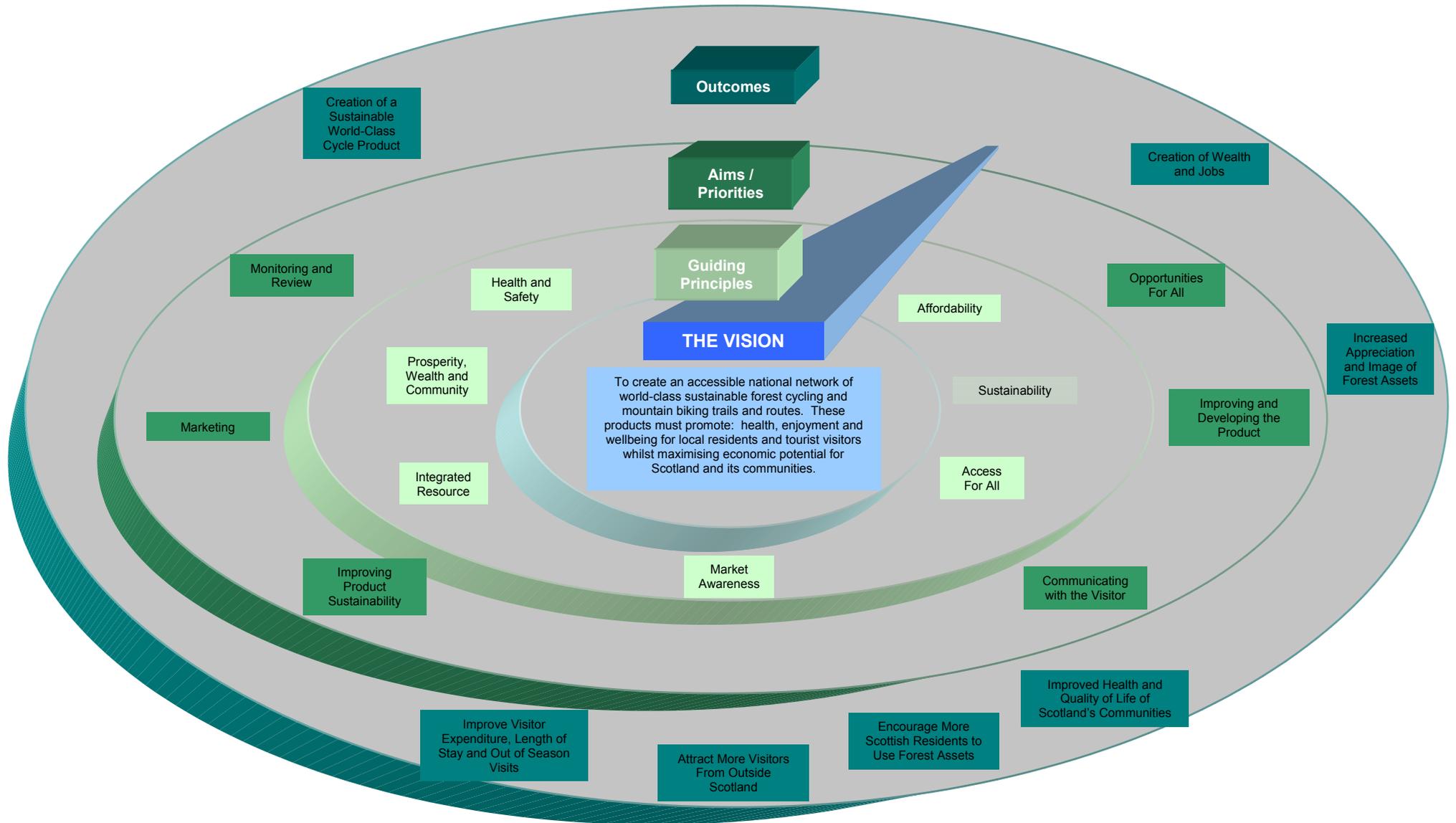
(vii) Health and Safety

This is a key guiding principle and this philosophy should encompass all development and management practices. The importance of increasing awareness and responsibilities for health and safety is key.

In order to deliver the vision a number of key strategic aims / priorities have been suggested. These strategic aims and priorities will link to various themes for action under the Forest Cycling and Mountain Biking National Strategy.

STRATEGIC AIMS / PRIORITIES	
Aim / Priority	Description
1. Maximising Opportunities for All	Build on the success of the 7stanes product and the opportunities / potential created by FCS to provide a cycle recreation and mountain bike product which is accessible with opportunities for all, promoting health and wellbeing.
2. Improving and Developing the Product	Create a 'world-class' forest cycling and mountain biking product which will attract people from outside Scotland to visit and encourage short breaks. This will maximise the economic benefit for Scotland and its local communities through the development of forest cycling and mountain biking.
3. Communicating with the Visitor	Improve communications with visitors in regards to information, interpretation, route grading, increase visitor enjoyment, health and safety, and better visitor management.
4. Improving Product Sustainability	Ensure that the cycling product, as part of wider forest recreation resource, is sustainable for the future. Improving maintenance, management policies and practices – promoting good design, ensuring markets continue to visit.
5. Marketing	Positively promote and maximise the use of the National Forest Estate as a key cycling and wider recreational resource for Scotland and its communities.
6. Monitoring and Review	Improve the measurement and the monitoring of the forest cycling and mountain biking developments and their contribution to the Scottish economy and ability to improve health and wellbeing.

The Strategic Framework



3 **BUILDING ON THE FRAMEWORK**

At a Forest District level detailed product development opportunities have been identified for each forest considered, based on visitor market potential, social inclusion opportunity, forest sensitivities, access and partnership issues etc.

Some forests have realistically very little potential due to location, ground conditions, poor access, usage demand etc. However, some locations have considerable opportunities for social inclusion, health and tourism.

All in all, from a market opportunity perspective, there is considerable potential at each Forest District level but the individual projects need to be prioritised in order to meet the aims and objectives of the Forest Cycling and Mountain Biking National Strategy. There also needs to be an indication of project development timing. However, this will largely be dictated by the availability of public sector funds.

The National Strategy will have a slightly different emphasis to regional strategies in that there is a need to improve Scotland as a world-class cycling and mountain biking destination as a whole.

The key guiding principles and aims of the National Strategy are not just about economic development priorities. They are also about access for all, rural economic development, health and wellbeing and sustainability. The strategic framework has a large number of recommendations and conclusions. The following summarises the key strategic recommendations:

1. Ensure that all future development is market-led. Identify key target markets for individual developments to help differentiate the product. Ensure correct facilities are developed for correct markets, a key part of a regional strategy;
2. The National Strategy must widen the market base. Ensure cycling is accessible to a wide range of markets – novices, families, older cyclists, etc. Develop a range of entry level development products to satisfy these markets. Work with partners at national and community level to identify social inclusion and health opportunities;
3. At a regional level, work with public sector partners and private sector to ensure cycling is fully integrated with wider tourism destination credentials. Widen appeal of facilities to other recreation users and maximise commercial, economic and social opportunities;
4. Carry out additional strategic product development at national centres: Glentress and Leanachan Trails to make them truly 'world-class'. Develop new and improved central facilities at all national facilities – widen appeal of facilities to other recreational users;
5. Build on the success of the 7stanes mountain bike product by developing a network of purpose-built, sustainable 'off-road' cycling clusters and 'new forest cycling products' aimed at wider markets throughout Scotland;
6. FCS to work with partners to fill the product gap for 'off-road' facilities at key strategic locations particularly in the West of Scotland (see Trossachs) aimed at local residents and overnight tourists and develop a new range of 'forest cycling' products aimed at novices, families, older cyclists – cycle tourists. Signed routes of various lengths should have fantastic views etc (see Epic brand);
7. Carry out a detailed study to maximise the commercial opportunities at each forest site as a contribution to ongoing quality maintenance, health and safety, customer care liability etc;
8. FCS to work and lead on communication with local communities to ensure recreational support facilities are provided. Maximise business links, social and educational opportunities etc;

9. Continue to develop a fully comprehensive trail grading and inspection system for purpose-built single track facilities. Detailed policy manual to be written as guidance for trail designers / FCS regions / communities / volunteers;
10. FCS, together with the appropriate partners, should prepare a visitor site information and interpretation strategy for all forms of recreation, including cycling. Identify suite of information and 'corporate' format;
11. Continue to discuss and devise health and safety recreational policies for forest cycling and mountain biking in line with Great Britain level thinking – this will ensure a consistent approach. Safety plans and risk assessments must be prepared for each forest site ie emergency procedure, accident reports, escape routes etc;
12. FCS to devise / design a customer care system. Consider extending provision of mountain bike and recreation rangers at key sites – role to include customer care, trail maintenance, health and safety etc;
13. Improve and maintain trail quality. Develop a better controlled and more comprehensive and holistic system re best practice manual for new trail development and planning to ensure trails are developed to the correct grading and standard to satisfy target markets. Ensure ongoing maintenance liability on individual sections of trail are identified at planning stage and future maintenance required is recorded, assessed and carried out;
14. Establish, create and test mountain bike brands for Northern and Central Scotland and develop a marketing strategy and action plan for forest cycling and mountain biking which fits with wider forest recreational aspirations and other FCS strategies;
15. FCS, together with EventScotland, to seek to attract more international cycling events to Scotland post-2007 and work with partners to devise an effective events programme at a national regional and community level;
16. Devise and put in place a monitoring and evaluation framework. Carry out additional visitor surveys to help guide development.

4 CONCLUSION

This framework document outlines an ambition and quantifies the considerable market opportunity for forest cycling and mountain biking on the National Estate, throughout Scotland both at a local and national level.

This detailed research document should be used as a tool to help guide FCS in the formulation of their future forest cycling / mountain biking recreation strategies. The document helps give direction and prioritisation of future projects from a national perspective and gives a balance and focus to development. However, the overall development cost and the ongoing maintenance liability is considerable but so are the economic, social, health and community benefits.

TRC believe that the overall ambition outlined in the framework is achievable and should be a target for FCS strategies even although, in the short term, the availability of public sector funding re both FCS and key partners may be limited.

Forest cycling and mountain biking is full of success stories but their needs to be a pragmatic approach to continued development in the short term. There needs to be a period of consolidation and improvement to existing products, facilities, management and maintenance practices before moving on with further large scale development. However FCS together with partners must plan more efficiently for the future so that opportunities can be exploited and areas of key development can be identified and ambitions met when funding conditions allow.

In the short term the following key actions should be considered by FCS as a priority at a strategic level:

- Improve general forest cycling and mountain biking project management;
- Better understand and monitor maintenance liabilities at existing sites;
- Improve and build up better cost database and carry out better evaluation of existing products to help guide future development;
- Complete health and safety project work which has now been started. Develop policies and good practice guidelines. Introduce and operate effective systems and record keeping;
- Work on quality standards development and link to health and safety;
- Further developments, refinements to trail grading and system of trail checking is required;
- Developments required to improve marketing, branding, communicating and visitor interpretation;
- Need to consolidate existing national centres – Glentress and support 2007 World Championships at Leanachan with appropriate capital improvements / development;
- Need to consolidate and improve current trails at existing / potential regional centres within available resources;
- Need to finish existing commitments (see 7stanes) before starting development of new large-scale projects;
- Need to start to develop project plans together with partners for key strategic centres ie Trossachs National Centre and regional centres;
- In the short term FCS needs to strengthen their advisory role and links with community and volunteer projects. Areas where FCS needs to concentrate include making partners aware of: liabilities, risks, maintenance requirements, need for quality, grading trails policies, record keeping etc.

As a way forward it is recommended that FCS use this framework document as an ambition, the basis for the development of a Forest Cycling and Mountain Biking National Strategy.

1 STUDY BACKGROUND

Forestry Commission Scotland (FCS) is the market leader in forest cycling in Scotland. It has developed internationally renowned facilities at Glentress, Fort William and Laggan and these were accredited amongst some of the 'hottest' places to ride in the World – International Mountain Bicycling Association (IMBA) 2004. Cycle developments have increased visitor awareness of some of Scotland's most remote rural areas promoted / enhanced regional tourism infrastructure and generated economic growth to many local areas. FCS cycling facilities have also brought health and social benefits to many of Scotland's communities, increased access opportunities to the forest and had a positive impact on tourism / job opportunities in surrounding local / rural areas.

The cycling products of Scotland are undoubtedly world-class. However, the mountain bike and forest cycling market in the UK is immature. The FCS cycling product has been, to date, largely supply-led and opportunistic at a local level, with no recognised strategic direction to future development and long-term sustainability in place. The long-term success and sustainability of FCS cycling provisions is integral to the FCS recreational strategy. A strategic approach to cycling on the National Forest Estate in future will ensure that cycling complements and does not conflict with wider FCS recreational facilities, existing forest markets and makes 'good use of FCS recreational budgets'. The overarching recreational aim of FCS is to grow / stimulate recreational use of the National Forest Estate. Forest District recreation strategies will provide this overview.

As a result of these underlying objectives and to achieve maximum success FCS seeks to develop a Forest Cycling and Mountain Biking National Strategy which will provide a framework outlining forest cycling guiding principles, aims / objective, priorities and which will give FCS a clear focus for the future management of FCS forest cycling and mountain biking on the National Forest Estate.

FCS has duly commissioned Tourism Resources Company (TRC) to prepare a research document and framework, an ambition towards a strategy for the management, development and sustainability of cycling facilities on the National Forest Estate in Scotland.

The strategic approach of this study will ensure all future cycling developments, marketing and sustainable product opportunities are determined and the impacts of FCS resources confirmed at a national level before any future development is undertaken. Although the consultants' strategic approach is largely 'market-led', and this is the emphasis of this document, the research has been balanced by consultations at national, regional and community levels. Issues which have been considered include: supply considerations, future product sustainability, physical constraints and strengths of each forest site, landscape quality, access, links to visitor destinations, environmental issues / sensitivities, health and safety concerns, social needs, economic impacts etc. This strategic and market-led approach will confirm the correct range of products to be developed for the target markets throughout Scotland in the medium to long term.

The substance of this document will involve the following key components as highlighted in your initial study brief. TRC will:

- Prepare a framework towards a National Strategy for the management of cycling facilities and services on the National Forest Estate in Scotland;
- Identify the scale, composition and nature of future developments;
- Optimise the marketing and promotion of FCS re packaging / brand awareness / linkages / costs etc;
- Set a contextual background for forest cycling in Scotland ie trends;
- Promote best practice management (see regional strategies), monitoring and maintenance of key cycling sites re operations / decision-making / resource allocation;
- Ensure that FCS and Scotland maintains its position as cycle product market leader;
- Prioritise potential products for development. The rationale for this will be detailed throughout this document.

This document will form the basis of the FCS Forest Cycling and Mountain Biking National Strategy. The future Strategy will cover a period of 3-5 years from 2006 to 2010. The Forest Cycling and Mountain Biking National Strategy will also be an important facet of FCS' wider recreational strategy / direction.

This strategic document has been compiled with both a 'top down' and 'bottom up' approach. A Scotland-wide geographic / market and economic assessment of FCS forest cycling developments has been undertaken by TRC in the last 18 months. Each of these separate reports considers market and product development in some depth. The detailed research at Forest District level, together with a concentrated approach to this research study, will form the basis of the Forest Cycling and Mountain Biking National Strategy.

An action plan framework which pulls together a number of recommended actions and a summary of the strategic framework is presented as a standalone document in Appendix XIII.

2 STRATEGIC CONTEXT

This document is influenced by the strategic parameters and policies, set both at national and regional levels, as well as the market opportunities available and other issues identified locally. The document also reflects and considers the regional market assessments undertaken by TRC in our recent regional cycle product / market evaluations (during the last 18 months). To effectively inform cycling direction, the document must reflect and accommodate the opportunities / aspirations of FCS existing Scottish Forestry Strategy 2000 / recreational objectives and visit other public sector relevant frameworks. The strategy translates and considers these external policy documents below.

Local initiatives and strategic policy decisions have already been addressed within our previous regional market / product assessments which inform this strategy.

The strategy document maps out the headline initiatives that will help FCS forest cycling and mountain biking to achieve its long-term objectives and fulfil its aims / objectives in line with its guiding principles.

Scottish Forestry Strategy 2000

(This is currently in the process of being updated)

The Scottish Forestry Strategy is the Scottish Executives' framework for taking forestry forward through the first part of the new Century and beyond.

FCS' mission is to protect and expand Scotland's forests and woodlands and increase their value to Society and the environment.

The Scottish Forestry Strategy 2000 included the following guiding principles:

- To maximise the value to the Scottish economy of the wood resource available over the next 20 years;
- To create a diverse forest resource of high quality that will contribute to the economic needs of Scotland throughout the 21st Century and beyond;
- To ensure that Scotland's trees, woods and forests make a positive contribution to the environment;

- To create opportunities for more people to enjoy trees, woods and forests in Scotland;
- To help communities benefit from woods and forests.

The final two principles of this strategy are pertinent to the evolution and development of the FCS forest cycling product. A number of priorities for action under these two principles which influence FCS forest cycling and mountain biking include the following:

- To create opportunities for more people to enjoy trees, woods and forests:
 - Provide woodland recreation opportunities near towns;
 - Improve availability of information about opportunities;
 - Increase forestry's contribution to tourism.
- To help communities benefit from woods and forests:
 - Create wider employment opportunities;
 - Increase opportunities for community consultation;
 - Provide opportunities for greater community involvement in forestry;
 - Support community ownership where this will bring local benefits.

The Scottish Forestry Strategy 2000 however is currently being updated and the latest thinking is that the revised strategy will incorporate three key priorities which will impact forest cycling and mountain biking and other recreation facilities:

First
Priority - Maintain and manage existing forest facilities and relationships with users and stakeholders to ensure good quality visitor experience.

Second
Priority - Plan future developments on National Forest Estate property (these developments need not be FCS-led, they could be championed by either private or voluntary / community sectors). Rules of engagement, standards and quality need to be established. These developments must be economically and environmentally sustainable.

Third - FCS seeks new resources for new developments and
Priority their ongoing maintenance and management.

In respect of these key guiding principles and future priorities, FCS is keen to create and enhance their recreational product offering while, at the same time, open the forest up to the widest possible market. Instances of success would include the £3.5 million WIAT Challenge Fund, the Forest Fabrication Initiative – to increase the understanding and appreciation of the environment, social and economic potential of FCS. The development and expansion of tourism on the National Forest Estate – is gaining wider recognition and importance in National Tourism Strategies. These are all examples of the successful implementation and expansion of the FCS recreation product offering in response to an increase in demand for outdoor leisure pursuits.

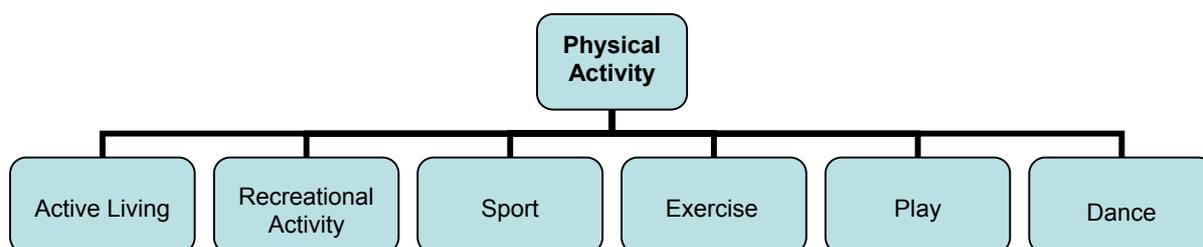
NB The Scottish Forestry Strategy was published in 2000, due to a number of contextual changes since; a wider review of the strategy is underway. An exhaustive consultation process is in process and a new Scottish Forestry Strategy is expected to be drafted in 2006.

National Physical Activity Strategy

For centuries, people in Scotland led active lives – but not today. As a nation, Scotland is inactive, unfit and increasingly overweight. Nearly two-thirds of Scotland's adult population is at risk from physical inactivity. The National Physical Activity Strategy aims to change this, but it requires a change in policy and culture.

Scottish Ministers set up a taskforce in 2001 which followed a commitment in the Government's White Paper: 'Towards a Healthier Scotland'.

Given the scale of the task and the degree of cultural change required, this strategy will take 20 years to achieve its goal.



This strategy framework is consistent with the World Health Organisation (WHO) policy and the five main policies of the 'Ottawa Charter for Health and Promotion 1996'.

- Building healthy public policy;
- Creating supportive environments;
- Strengthening community action;
- Developing personal skills;
- Directing health services at people who need them most.

The benefits of physical activity are:

- Longer life;
- Less risk of developing disease;
- Greater wellbeing;
- Fewer symptoms of depression;
- Lower rates of smoking and substance misuses;
- More ability to function better at work and home.

The benefits to Scotland are improved wellbeing of the population and increased economic activity, a 'healthier nation'.

The implementation of the National Physical Activity Strategy is being supported by an integrated programme of communication and public education as part of the overall health improvement agenda.

The components of this programme comprise the healthyliving campaign – a multimedia, multi-component approach – delivered by the Scottish Executive in partnership with NHS Scotland.

The healthy living brand is embedded into local work initiatives, projects and promotions, working in partnership with the private and public sector.

FCS and the National Forest Estate have a key role to play in providing a safe resource for recreation which will promote healthier lifestyles. The development and management of more of these accessible recreation facilities across Scotland can help this strategy to be realised.

Physical inactivity is a major issue of health inequality. Working with communities and other public sector agencies, FCS can help to redress the imbalance.

Active Communities – Community Planning Partnerships

Community Planning Partnerships have been set up across Scotland since the late 1990s. Community Planning is an important system for meeting locally identified needs and delivering national policy. The purpose of Community Planning is to make a difference through community partners developing an agreed strategic vision for their community, dealing with 'cross-cutting' issues of social, economic and environmental health of the community.

Each plan tends to share visions which embrace social, economic and environmental objectives. It is recognised that a sound local economy is essential for the prosperity and wellbeing of local communities across Scotland.

In order to improve the economic conditions, the correct framework has to be put in place which promotes better health and wellbeing (lifestyle and life circumstances). There also must be improved opportunities for learning, employment and skill development, together with sustainability.

The successful implementation of Community Planning depends on the extent to which partners and the community take joint ownership and delivery of the strategies to influence its outcome.

FCS already takes an active role in Community Planning throughout Scotland. The forest resource is key to improving the health of communities but it is also extremely important as a catalyst for visitors and tourists.

As a result this promotes opportunities for local support businesses and creates jobs and expenditure in local communities.

This strategy identifies strategically important community level projects which will be championed by community volunteers under the guidance of FCS management and staff.

Mental Health and Wellbeing

A number of initiatives across the Scottish Executive are already improving life circumstances as well as lifestyle issues. A key priority is to ensure the importance of mental health is embedded in Scottish Executive policies. Positive mental health and wellbeing is important within the whole Scottish Executive Agenda and requires work, partnership and joined-up thinking across the full spectrum of the health sector, education, social justice, employment, health at work and local communities. FCS has a role to play in these issues, working with other public sector bodies and communities to help provide facilities and a framework where forest recreation can be used positively to improve the wellbeing, confidence, a place to de-stress and relax, providing a key resource.

Towards a Cycle Tourism Strategy for Scotland

The report highlights opportunities for future development in cycling which would lead to an increased growth in cycle tourism and contribute to the growth of Scottish tourism as a whole. The report is also aligned closely with the priorities laid out in the Tourism Framework for Action 2002-2005 and provides recommendations for future action.

The report distinguished four target markets for growth:

- Day trip cyclists;
- Holiday cyclists;
- Mountain bike specialists;
- Touring specialists.

For cycle tourism in Scotland to move forward and to achieve its vision a number of aims have to be addressed. These include the following:

- Integrate the existing network of routes and trails into the mainstream Scottish product;
- Enhance the marketing of cycle tourism and raise the profile of Scotland as a cycle tourism destination in both domestic and overseas markets;
- Improve the available market intelligence.

These issues are very much in line with TRC's product and market recommendations for forest cycling and mountain biking as presented in our recent regional forest assessments.

Cycling Scotland – Assessment of Local Authorities

The cycling strategy was established to support the development of cycling in Scotland mainly as a mode of transport. The report provided summaries for each of Scotland's 32 Local Authorities and included issues such as health, environment, social inclusion, access and education.

The report assessed Local Authorities' positions on cycling and advised on cycling developments at a local, regional and national level.

At a regional level the report aimed to raise awareness of the opportunities for joint marketing to promote cycling and at a national level to integrate cycling and walking to the broader trail agenda.

Tourism Framework for Action 2002-2005

This strategy aims to build / develop an internationally competitive Scottish tourism industry. The framework's vision is: 'Scotland as a must visit destination where visitor needs come first and tourism makes a vital contribution to economic growth'.

There are many opportunities and challenges facing the Scottish tourism industry. This Scottish Executive-driven framework aims to establish a cohesive and united way to improve business performance and to ensure that tourism is positioned at the centre of economic activity and the public policy debate in Scotland.

As part of this vision for Scottish tourism, public sector agencies should work to deliver recommended actions / priorities as per the strategic tourism framework for Scotland. FCS' responsibilities of note include in this tourism framework strategy the following:

- Support the development of appropriate tourism facilities at key locations including the cities, Loch Lomond and The Trossachs and Cairngorm National Parks;
- Serve as an exemplar in the management of rural recreation and tourism;
- Increase forestry's contribution to tourism development.

These factors will help to enhance the status / reputation of Scottish tourism and to enhance the natural and built environment of Scotland. The above is a key indication of FCS' responsibilities in ensuring the tourism framework achieves its objectives.

Scottish Tourism – The Next Decade

This document (currently at draft stage, December 2005) takes a fresh look at what is happening in tourism markets and how the tourism market might change over the next decade and where Scotland seeks to position itself in the marketplace.

Tourism revenues generated in Scotland are worth around £4.9 billion in 2005. The UK leisure tourism market is still the dominant force and worth around £2.9 billion, the VFR component is worth around £0.36 billion. Scotland is increasingly a short break market, average stay 3.6 days.

VisitScotland's future product portfolio (re target markets) are detailed in this document. The table below indicates the range:

VISITSCOTLAND'S PRODUCT PORTFOLIO	
Active Scotland	Walking, cycling, mountain biking, golf, watersports.
Freedom of Scotland	All types of touring, wildlife / nature.
Business Tourism	Conference, meetings, incentives, exhibitions.
Cities	Attractions, shopping, nightlife, restaurants.
Culture and Heritage	Festivals, history / heritage, traditional, arts, genealogy, museums / galleries.

Under the Active Scotland banner is Adventure Scotland and this subset of the adventure brand includes mountain biking and cycling as two key / individual 'parts' of the promotion of Scotland as an adventure destination.

The document asks itself the question – 'What will our markets look like in 2015?' Building from scenario planning exercises, it sees Scotland's main focus as a leisure short break tourism destination. It is for FCS to ensure that there is the adequate provision of cycling and mountain biking facilities available to satisfy the short break cycling market.

Scottish Enterprise Tourism Cluster Strategy

The Tourism Cluster Strategy is consistent with the objectives of the Scottish Executive's Tourism Framework for Action (as highlighted previously). It provides a context for joint values across all public sector agencies and the tourism industry itself.

The Enterprise Network is keen to focus its resources on 'key tourism destinations' in Scotland. In this strategy Scottish Enterprise reaffirms its support for strategically significant tourism flagship projects in Loch Lomond and The Trossachs and Cairngorm National Parks. These network policies are integral to any future national cycling opportunity / development and must be given due consideration.

Other important priorities of the Tourism Cluster Strategy include:

- (i) Social Inclusion – connect disadvantaged areas and groups to opportunity. Tourism is an important provider of jobs and income in rural areas.
- (ii) Sustainable Rural Development – The Enterprise Network will help address rural development objectives by supporting:
 - increase of the availability of rural places through rural tourism projects, especially, Loch Lomond, Cairngorms and Galloway. Scottish Enterprise will support forestry / tourism developments.

A Smart, Successful Scotland

Key items emerging out of this document which are important to FCS recreation and future developments would include the following:

- SE support should capitalise on the tourism appeal of our main cities and other key locations to create jobs;
- Improve the attractiveness of key location for businesses and local residents along with visitors ie Scotland as an attractive place to live, work and visit;
- Integration across the public sector, especially in relation to the marketing and branding work of VisitScotland.

Scottish Outdoor Access Code

People's access rights to land in Scotland have recently been clarified. Part 1 of the Land Reform (Scotland Act 2003) gives everyone statutory access rights to most land and inland water. People only have these rights if they exercise them responsibly by respecting other people's privacy, safety, livelihoods and Scotland's environment. Land managers must manage their land and water responsibly in relation to these rights.

Open-air recreation, including cycling and walking, provides people with great benefits for health and wellbeing, and contributes to Society in many other ways.

The Scottish Outdoor Access Code provides guidance on the responsibilities of those exercising access rights and those managing land and water. The Code provides a practical guide to help people make informed decisions.

The Code is based on three key principles:

- Respect the interest of others:
 - Act with courtesy, consideration and awareness;
 - Respect privacy, safety and livelihoods.
- Care for the environment:
 - Look after the places visited and enjoyed;
 - Leave land as it is found;
 - Maintain natural features.

- Take responsibility for your own actions:
 - Outdoors is not risk free;
 - Act with care for other people's safety.

The Code has been approved by Ministers and the Scottish Parliament.

The Code provides guidance on access rights and responsibilities; it is not an authoritative statement of law.

Access rights can be exercised for:

- recreational purposes such as pastimes, family and social activities, active pursuits, participation in events;
- educational purposes such as understanding nature / cultural heritage;
- commercial activities (where they are the same as those done by the general public);
- crossing land / water.

Access rights are exercised in places such as:

- hills, mountains, moorland;
- forests and woodlands;
- urban, country parks, managed open spaces;
- rivers, lochs, canals, reservoirs;
- riverbanks, loch shores, beaches, coastline;
- land where crops have not been sown;
- field margins.

All public Rights of Way continue to exist and are unaffected by the Land Reform (Scotland) Act 2003.

The outdoors is a working environment and it is not risk free. There are many natural hazards such as uneven ground, rough paths, cliffs, steep rocky ground etc. Some activities such as mountaineering, mountain biking and canoeing use these challenges as the basis of people's enjoyment outdoors.

There is a longstanding legal principle 'Volenti Non Fit Injuria' which means that a person availing of access will generally be held to have accepted any obvious risks or risks inherent with the activities they are undertaking.

The new Access Code is key to the future enjoyment and responsible use of the National Forest Estate for recreation: forest cycling, mountain biking, walking, canoeing etc.

Conclusion

Cycling and wider recreation on the National Forest Estate provides a good opportunity to help meet the aspirations outlined in the Government's National Physical Activity Strategy, particularly where it is linked to improving the health of communities. As a result, disadvantaged communities or communities which have a greater degree of health issues will benefit more.

Forest cycling and recreation should also continue to be incorporated into the Community Planning process. Whilst health and wellbeing is important, the economic potential for rural communities in light of attracting new visitors from outside the area and creating new business opportunities should be appreciated.

Adopting the VisitScotland product portfolio approach and being aware of the market sectors etc that offer opportunities (ie tourists / day visitors) set alongside FCS cycling product strengths and weaknesses, tends to indicate that to optimise the opportunities for FCS cycling, a focus must be driven by key sites / venues where maximum market, economic and community opportunities exist. Investment in locational clusters / hotspots that already offer a concentration of facilities that fit with the national product portfolio and market trends should be considered. The FCS cycling and wider recreation strategies must align with the National Physical Activity Strategy, VisitScotland and other public agency strategies ie Tourism Framework for Action, as well as the Community Planning process.

However, some of these existing strategies are nearing the ends of their terms and are due to be updated and as a result strategic emphasis and focus could change.

This framework document and hence the future recreation product development on the National Forest Estate must be market-led and aligned to the three main types of visitors which offer opportunities:

- Community (cycle from home / work or travel by car for less than 15 minutes);
- Day visitors (spend more than three hours away from home but not overnight);
- Overnight tourists (UK and overseas).

3 CYCLE / MOUNTAIN BIKE MARKET TRENDS AND EVOLUTION

3.1 Product Evolution

The modern sport of mountain biking primarily originated in the United States in the 1970s. It was, at a time when bicycling was rapidly developing, that the first successful fat-tyre bicycle (aka mountain bikes) was built. Marin County, California was the location and it is now firmly recognised as the birthplace of mountain biking. There were many riders who laid claim to the birth of the sport however it is Gary Fisher and Joe Breeze who are officially recognised and acclaimed as founders of the sport. Together they set in motion a worldwide boom and transformed a previously traditional / one-dimensional bicycling product into a multi-million pound consumer sector.

The first two commercially produced bikes were sold in 1982 (the Stumpjumper and the Univega Alpina Pro). The consequences were an explosion in the sale and use of the mountain bike.

Mountain biking is the sport of riding bicycles off paved roads and is performed on forest roads, purpose-built single track trails, fire roads, access roads and multi-purpose trails. Since its embryonic beginnings, mountain bike sport has evolved into three broad categories: cross-country, downhill and freeriding. However the sport continues rapid evolution and this sees the sport now include: dirt jumping, street, North Shore and trials as further subsets of the mountain biking portfolio.

At the fore of the growth and expansion of a coordinated and developing US mountain bike market was the International Mountain Bicycling Association (IMBA) which was constitutionally formed in the spring of 1988. IMBA evolved out of five mountain bike clubs in California, linking together to quell the dangers of widespread trail closures. Their original ethos and guiding mission is to protect against trail closures and enhance trail networks. IMBA US now has internationally affiliated associations in Canada, Italy and the UK. The Association has grown rapidly with over 30,000 worldwide members and over 600 affiliated cycle clubs, cycle shops and corporate partners.

With the rapid growth in the popularity of mountain biking in the UK during the 1990s, IMBA-UK, an independent mountain bike advocacy, was founded in 2002 – their aim to provide a strong and effective voice, to build new trails and maintain existing networks. One overarching aim of IMBA-UK is to develop trails in England to the standard and quality already witnessed in Wales and Scotland.

In parallel with the North American mountain bike growth market, the UK has also seen a dramatic increase in the volume and value of mountain biking over the last two decades. Indeed by 1995, it was estimated (Bicycle Association) that 35% of all households in the UK owned a bicycle, today it is estimated that almost 60% of households own a bike. According to Keynote, mountain bike market sales in 1995 were split 60% children's bikes and 40% adult bikes. By 1999, the retail value of the cycle market in the UK was £426 million (Bicycle Association) with some 2.4 million units being sold.

3.2 Cycle / Mountain Bike Market Trends

There is limited statistical information available on the mountain biking market in Scotland, so the Consultants have provided an overview of the market and its developments at a UK national level.

In 2001, 6.3 million people in the UK participated in mountain biking / cycling (off-road) more than once. This represents more than 10% of the UK population. In excess of 2 million bikes are sold in Britain every year. In addition, a sports participation survey undertaken by Sports Marketing Surveys in 2001 estimated 5.7% of the UK population participated in mountain biking as a recreational sport. In Scotland, TRC assume this active participation to be nearer 6% of the population across Scotland.

2003 Cycling Statistics (VisitScotland)

In 2003, VisitScotland published a report into the importance of cycling to the visitor economy. This included the following quantitative data:

Cycling as Main Purpose of Holiday Trip

- 100,000 trips were taken by UK residents, where cycling was the main purpose of the holiday trip. This resulted in 600,000 bednights and an expenditure of £20 million;
- 59% of keen / enthusiastic cyclists travelled between July and September;
- The average expenditure per cycling trip was £200 which resulted in an average expenditure per night of £33;
- Cyclists tended to be aged between 35 and 44 and be in the AB social groupings;
- Of these 'main purpose of holiday' trips to Scotland, 32% were Scots and 63% English.

Cycling as Part of Holiday Trip

- Holidaymakers who included cycling as part of their holiday (main purpose or not) amounted to an estimated 900,000 trips or 4.8 million bednights in 2003 and a national expenditure of £200 million;
- Of these total 'cycling trips', 58% were taken by Scottish residents and 39% by English visitors;
- 'Cycling'-related visitor trips amounts to 8% of all holiday trips in Scotland;
- The average length of stay of 'cycling trips' in Scotland is five nights.

Cycle / Mountain Bike Market Trends

Patterns of growth can be identified by comparing the VisitScotland 2003 cycling factsheet – which is based on three-year average for the 2001 to 2003 period against the 2001 VisitScotland cycling factsheet.

TRENDS IN CYCLING TRIPS IN SCOTLAND 2001 TO 2003						
	2001 Number of Trips	2003* Number of Trips	Change between 2001-2003	2001 Expenditure	2003 Expenditure	Change between 2001-2003
Cycling as main purpose of trip	100,000	100,000	-	£8m	£20m	+150%
Cycling as part of holiday trip**	700,000	900,000	+28%	£147m	£199m	+35%

Notes: * Three-year rolling averages.

** Including main purpose or not.

The above figures suggest a steady growth in cycle tourism in Scotland between 2001 and 2003. The document Towards a Cycling Strategy for Scotland aims to double the number of cycling holiday trips.

Additional data which helps to substantiate the growth in cycling would be the recent user numbers recorded at key 7stanes sites. This highlights all visitors to the forest pre and post-7stanes development. Please note this is not just cyclists but also sightseers, walkers etc.

FOREST VISITOR NUMBER ESTIMATES			
7stanes Site	2000 (pre-7stanes) Estimates	2004 FCS Estimates	% change 2000-2004
Dalbeattie	12,678	22,864	80
Mabie	74,864	92,861	24
Kirroughtree	23,582	33,000	40
Glentool	14,345	20,733	44
Glentress	105,470	240,349	128

Note: These are all visitors, not just cyclists

Source: FCS

These figures signify the steady growth / growing importance of FCS forests as a leisure / recreational resource for the Scottish public. The growth is based on improved FCS access, increased awareness of forest offerings, recreational provisions and fundamentally an increase in active lifestyles and cycle usage throughout each forest.

Key Cycling Destinations

DESTINATION OF CYCLING HOLIDAY TRIPS		
Destination (ATB Areas)	Cycling as Main Purpose of Holiday %	Cycling as Part of Holiday %
Aberdeen and Grampian	2	5
Argyll, the Isles, Loch Lomond, Stirling & Trossachs (ALLST)	16	22
Angus and Dundee	-	4
Ayrshire and Arran	20	11
Dumfries and Galloway	13	11
Edinburgh and Lothian	3	9
Highlands of Scotland (HOST)	27	18
Glasgow and Clyde Valley	7	10
Kingdom of Fife	3	4
Orkney	-	-
Perthshire	14	8
Scottish Borders	1	3
Shetland	-	-
Western Isles	2	2
Base: No. of Trips	100,000	900,000

Source: VisitScotland

In terms of destination, those holidaymakers who visit Scotland primarily for the purpose of cycling HOST (27%) was the most popular area to visit whilst Ayrshire and Arran (20%) and ALLST (16%) also received a high proportion of trips. Where cycling formed at least part of the holiday trip 22% visited ALLST and 18% HOST.

Cycle Tourism Market Profile

As sourced from the paper Towards a Cycle Tourism Strategy for Scotland the key likes and dislikes of cycle tourist are as over:

LIKES / DISLIKES – IN ORDER OF IMPORTANCE	
Likes	Dislikes
Scenic countryside	Hills (will accept some gradients)
Well-maintained bike	Sore bottoms
Quality mountain bikes	Bad weather
Traffic-free routes	Mechanical failure
Waymarked routes	Complicated gears
Freedom	Prices
Comfortable saddles	Punctures
Refreshment stops (good café / pub)	Muddy, rough surfaces

Source: *Insights Article by Les Lumsdon on Cycle Tourism in Britain 1996*

Conclusion

There are no definitive statistics available on the number of people who would actively cycle as a recreational cycling activity in the UK or in Scotland, but it would appear that cycle ownership is high and this together with the current trend for outdoor activities suggests that it has grown in recent years. The 7stanes mountain bike development together with the recent World Cup Mountain Bike Series at Fort William has boosted interest in 'off-road' cycling as a sport and as a recreational activity. TRC conservatively estimate that on average at least 6% of the population participate in forest cycling and mountain biking in Scotland but this assumption will need to be tested and verified through more comprehensive visitor surveys in the future.

4 PRODUCT EVOLUTION AND OVERVIEW OF CURRENT FACILITIES

The Forestry Commission has more than 2,600km of cycle routes on its 1.04 million hectares of National Forest Estate land in England, Scotland and Wales and features arguably the best off-road cycling route provision in Britain. Traditional forest cycling has been a key part of the Forestry Commission's recreational offering over the last 2-3 decades ie since the introduction of the mountain bike.

FCS offers the largest and widest range of facilities for recreational cycling in Scotland. The vision is to protect and expand Scotland's forests and woodlands, and increase their value to Society and the environment. Cycling helps to realise this vision by offering opportunities for greater and wider market use of the National Forest Estate. It also provides better access for communities to become more involved and gain better benefits from the National Forest Estate. It is integral to FCS' recreational product offering / value and wider profile. The Forestry Commission has also recently won an award from Sustrans for its role in helping to develop the National Cycle Network – it won recognition from Sustrans from its 'supportive landowners' category for providing many crucial links as well as whole networks of local cycling routes over the National Forest Estate. The Forestry Commission offer people more recreation choice in ways that benefit their health. They also expose a growing number of people to the pleasures of the natural environment. The Forestry Commission Active Woods campaign launched in 2005 is an attempt to get more people using his or her local forest, to feel better, fitter and to promote healthy living. The Forestry Commission and its provision of mountain bike trails is pertinent to the Active Woods Initiative, to make the forest a place for fun, entertainment, leisure and events. The initiative also fits closely in line with the National Physical Activity Strategy.

FCS has over 100 forest cycling destinations for the visitor to choose from within Scotland which offer a cycling experience (see FCS website). This type of 'off-road' cycling is generally on un-metalled / forest roads – traffic-free and generally a safer, quieter experience than road cycling. The range of FCS cycle products include: purpose-built mountain bike centres, forest roads, paths, tracks, long-distance ways, user-built facilities / routes etc. Off-road cycling can generally be broken down into two sub-headings: (1) being the traditional forest cycling product, which has historically occurred on forest roads for many decades; and (2) the 21st Century single track / purpose-built mountain biking facilities which are being developed at a brisk rate throughout Scotland. A description of both is as follows.

A – Traditional Forest Cycling

- The Forestry Commission offers cycling routes in many of its forests, and a variety of cycling experiences from wide forest roads, waymarked trails to narrow single tracks. In many instances these trails are multi-purpose and used for commercial forest activities and recreation pursuits etc;
- In February 2005, the Scottish Outdoor Access Code came into operation and as a result everyone is now able to enjoy statutory access rights to cycle on FCS land. Cyclists can use all forest roads (even if they are not signposted, except when advised to avoid re forestry operations);
- Predominately, forest roads are multi-user and wide enough for vehicles, cyclists and horseriders to share. Some are waymarked, some built for recreation purposes, some for cycling. However, most of these FCS roads and tracks have been designed and constructed for forest management, with slow but heavy moving vehicles in mind (ie 44 tonnes logging trucks). They have not been specifically designed for cycling. As a result, some of these routes are steep, rough and not really fit for cycling;
- Traditional long-distance Epic-style / wilderness cycling / Great Glen / 10 Glens etc. Cyclists can cycle in the natural environment, long rides, roads and routes which are not waymarked. The individual can 'create' their own route, by using maps and local knowledge etc;
- Increased future access to forest cycling is expected through community woodland initiatives ie Active Woods and Woods In and Around Towns, which are Forestry Commission initiatives to offer a greater range of health and fitness opportunities to the public within the forest assets.

B – Purpose-Built Single Track Mountain Biking

- Prior to the development of purpose-built single track facilities, there was a need to create routes for mountain biking, as a result of local youth self-built tracks, jumps and obstacles in woodlands around towns and villages. This spawned purpose-built FCS facilities such as Fochabers, Learnie, Kirkhill etc;

- The youth of today continue to develop unregulated self-build facilities. One of the aims of FCS and this framework document is to help work with communities to improve the quality and safety of these ad hoc facilities;
- The UK mountain bike market is still in its infancy. The initial development of more intensive single track cycling in Southern Scotland was seen as a catalyst to assist rural development and economic opportunity / diversity. The 7stanes “Scotland’s biking heaven” was inspired by the success of Forest Enterprise Wales mountain bike developments at Coed-y-Brenin. Key purpose-built single track developments / models have been benchmarked and reported in Appendix III;
- On the back of the 7stanes developments and its evident successes, many other exciting and successful single track purpose-built developments have been undertaken on the National Forest Estate. Named successes include Glentress (part of the 7stanes development) which attracts over 250,000 forest visitors and at least 150,000 riders annually; Fort William Leanachan Forest is a recognised World Cup and Championship downhill and cross-country venue / destination; Laggan Wolftrax, in its inaugural year, is proving an exciting / fun packed regional facility and development at Learnie on the Black Isle (Inverness-shire) re Learnie Red Rock Trails are helping to open new access / tourism potential in the rural areas. Also there are purpose-built single track developments being undertaken in Sutherland (Dunrobin Estate / Golspie – private), West Argyll, Moray, Kincardine and Scottish Lowlands;
- FCS mountain biking ‘facilities’ encompass purpose-built single track cycling facilities of national, regional and community importance in addition to traditional / existing forest cycling and FCS recreational pursuits ie walking and horseriding routes. Forest cycle products have evolved and been developed by FCS in geographical terms in the top and bottom thirds of Scotland on rural economic grounds (ie as yet there has been no significant development, in West or Central Scotland). Future developments at Carron Valley, Blairadam and the Trossachs will undoubtedly change this;

- A range of products have been developed at each of these mountain bike facilities including technical purpose-built ie trails, fun parks and freeriding, natural developments and signed forest roads re Cross-Country Epics. In most purpose-built development scenarios the difficult / signature routes have been developed first ie 'black routes' (both longer cross-country and downhill) requiring the highest technical ability and word of mouth recommendation have generated trail usage. Very often these trails have been built by a local community or volunteer base for their own use. These trails are technically illegal unless agreed with the Forest District Manager;
- The current purpose-built mountain bike products tend to attract a predominance of male 20-35 years olds – aficionados / enthusiasts. However, at certain sites (see Glentress) there has been a growth in woman and older cyclists. A Saturday Morning Club has promoted the facilities to children providing tuition, guiding, etc;
- Future mountain bike-related strategies / developments (eg Pollok Park, Glasgow) will increasingly promote social inclusion and the health agenda particularly in the Central Belt of Scotland re high population catchment and high areas of social / economic deprivation;
- Scotland has been very successful in the international mountain bike arena. Over the last four years the Fort William (Nevis Range and Leanachan Forest) has secured an annual round of the World Cup Mountain Bike Series. The venue provides international competition for four mountain bike disciplines: Downhill, Cross-Country, Trials and 4-Cross. Leanachan will host the Mountain Bike World Championships in 2007 which will cover all the above mountain bike disciplines;
- FCS is seeking to make key mountain bike venues, Glentress and Fort William, truly world-class. This strategy should be applauded as it will ensure that Scotland is at the forefront of trail and product development in the future, investing £2 / £3 million in Glentress 'front of house' to enable better visitor servicing;

- This strategy also helps underpin the international events which Scotland has secured in the mountain bike arena as well as the attractiveness of Scotland as a mountain bike destination for visitors, particularly the English market;
- The National Forest Estate in recent years has been used as a venue for national and local cycling events. The Scottish Downhill Association (SDA) and the Scottish Cross Country Mountain Bike Association (SXC) each year holds rounds of the national points series competitions. Rounds of the British level points series have also been held in Scotland. The forest resource is an ideal venue for cycle marathon, triathlon and other fitness, endurance-style events. Charity and children's cycling events have also been held in forests throughout Scotland;
- Glasgow is hoping to attract the 2014 Commonwealth Games. As cross-country mountain biking is a recognised event, this gives opportunity for a purpose-built venue. In addition, in the run up to and following the Games, there will be increased interest in mountain biking as a sport;
- FCS forest cycling and mountain biking is now an internationally recognised product of world-class status. FCS must be commended for their approach and indeed delivery of this successful product. These developments also go some way to achieving / meeting overarching vision / principles of FCS.

Other types of cycle product development worthy of mention include dirt jumping and street riding highlighted in Appendix IV, private estate developments Appendix V, other UK Forestry Commission developments Appendix VI, North America developments Appendix VII and Local Authority initiatives / urban-type developments Appendix VIII. The purpose of this added value information is to provide the reader with the fullest understanding of the diverse mountain bike product.

This section now goes on to detail the strengths, weaknesses, opportunities and threats of the FCS forest cycling and mountain biking product.

Strengths

The strengths of Scotland's forest cycling and mountain biking product is summarised as follows:

- Scotland is recognised as a world-class cycling and mountain biking destination;
- The 7stanes sites, and Glentress in particular, represent a very good product. The 7stanes has growing brand awareness / recognition;
- A large diverse forest network, with many forests close to large centres of population or key tourist destinations;
- A good mountain bike experience for intermediate and advanced riders has been created;
- The World Cup Downhill, Cross-Country and 4-Cross spectator event at Fort William and the forthcoming World Championships in 2007;
- Forest cycling and mountain biking links well with VisitScotland / Active Scotland product, community and other strategies;
- The existing / extensive provision of forest roads and paths;
- Throughout FCS there is a good network of enthusiastic FCS staff who are keen to develop the cycling product further;
- The successful creation of commercial business opportunities for trail support services and 'spin-off' for communities;
- Children's Saturday Club, tuition and skill facilities offered at key sites, new markets being visibly created;
- Central facilities at Glentress (upgrade planned), Laggan Wolftrax and Kirroughtree (now need upgrading);
- The positive economic impact of cycling on rural communities;
- A growing network of private sector trail designers, each with their own skill base / individuality;
- Growing experience of trail design and management / maintenance within FCS;
- A growing number of active communities involved in cycling, in particular in partnership with FCS;
- The National Cycle Network Sustrans and its potential to stimulate local communities and links to forests;
- A growing network of local cycling clubs with a mountain bike section who are taking regular trips to purpose-built cycling facilities;

- Outdoor activity centres have enhanced mountain biking as part of their menu of activities offered;
- Cross-country cycling is recognised as an Olympic and Commonwealth discipline;
- Cycling has a recognised governing body, Scottish Cycling, with affiliated cycle club structures including the SDA and SXC;
- The range of local / community and regional events offered in forests throughout Scotland.

Weaknesses

The weaknesses are summarised as:

- Product development has been largely supply and enthusiast-led rather than market demand-led. It has not been objectively researched and evidence-based;
- There has been a lack of a strategic approach to product development;
- There has been a concentration on the micro trail design issues rather than the macro planning / management and sustainability issues;
- Product inconsistency issues are evident;
- Lack of market segmentation / understanding of different market needs / wants;
- Trail development has been rather exclusively concentrated on intermediate and advanced skill levels rather than entry level – novice / family;
- A rather poor integration of cycle / mountain biking with other forest recreation users at some sites;
- A uniform trail grading system has not yet been fully adopted, so there is visitor confusion;
- A limited understanding of trail design implications has led to increased costs, quality and ongoing maintenance issues;
- The trail branding re 7stanes and the rest of Scotland is now confusing for the marketplace;
- At a FCS level there is only a limited understanding of the emerging cycle products and their corresponding markets (ie lack of consumer research);
- There is no understanding of how future sites might work together / clustering to attract overnight visitors;

- The current spate of new developments is responding to interest from small local user groups rather than the wider visitor market;
- No assessment has been made of ongoing maintenance liabilities;
- 7stanes marketing and branding has improved and has been successful but there is no strategy to evolve other brands countrywide, sub-brands hierarchy, etc overall marketing is still poor;
- There is only a limited understanding of the linkage of cycling to wider tourism destinations in the strive for economic gain;
- Local Forest Districts have good autonomy but consistency of management policies and practices re cycling across Scotland is poor;
- There is no national project prioritisation. Community developments must fit and be prioritised at a national level;
- The cycling products currently lack a fully integrated and consistent approach to information, interpretation and signage;
- There is a lack of market research and ongoing site monitoring evaluation; There is a lack of understanding of recreation impacts on conservation interest;
- Front of house services are generally poor ie the ones which have been developed at Laggan Wolftrax and Glentress are temporary (although the consultants are aware of future proposals re Glentress);
- There is a lack of sustainable transport links to forests so need for visitors to come by car.

Opportunities

The opportunities are summarised as:

- Showcase Scotland and national forests for a new audience;
- For Scotland to become a recognised international cycling, visitor destination and events venue;
- To become a leading world-class forest cycle and mountain bike brand known nationally and internationally;
- Capture the growth in demand for FCS recreation ie cycling, walking and other activity holidays and day visits etc;
- Opportunity to grow the number of people who cycle / mountain bike in Scotland;
- Develop world-class national and regional forest cycling and mountain biking facilities building on the success of the 7stanes;

- Maximise economic benefit and demand sustainability by ensuring purpose-built facilities are integrated as part of wider tourism destinations;
- Build on the strengths / characteristics at individual forests to ensure a distinctive and unique experience is offered;
- Opportunity to develop a range of diverse cycle products to satisfy a wide range of markets and their needs / wants;
- Opportunity to invest in new visitor services and facilities;
- To develop standards and good practice / guidance and expertise;
- To cross-sell other forest 'products';
- Opportunity to promote cycling on the National Forest Estate re support health, wellbeing and social initiatives;
- Respond to local demand and support well thought out local initiatives at the appropriate level;
- Attract to the National Forest Estate a greater number of entry level – family and novice cycle markets;
- Encourage existing, intermediate and advanced cyclists to visit the National Forest Estate more often, repeat visits and stay longer;
- Encourage cycling to play a greater part in economic development in a number of rural areas;
- Opportunity to promote the forest and its wider appeal / offering the forest experience to a new range of markets;
- Build on the opportunity created pre / post-legacy – World Cup Mountain Bike Championships in 2007;
- Maximise the opportunity to stage regional and community cycling and mountain biking events on the National Forest Estate.

Threats

The threats are summarised as:

- Product continues to attract mainly enthusiasts / higher social class users;
- Disturbance to wildlife / other users / neighbours;
- Competition of cycling / mountain biking in Scotland from other destinations ie Wales, Ireland / North of England;
- The inability to provide a long-term sustainable cycle / mountain bike trails / network / products;

- A lack of commitment to a strategic approach to the development and management for forest cycling and mountain biking could lead to duplication, product inconsistency and internal competition;
- Possible future litigation due to poor design or improper management / policies and practices;
- A decline in the trend to cycle / mountain bike off-road or a change in cycle market habits / trails / fashion;
- A dramatic fall in the number of possible funding avenues;
- A dramatic change in bike technology;
- A change in Scottish Executive national policy re health and social inclusion;
- A significant change in the role and remit of the Forestry Commission;
- Failure to invest in key supporting infrastructure / services and maintenance.

5 THE VISION AND STRATEGIC OVERVIEW

5.1 Introduction

The foregoing analysis and the suite of regional forest cycling market assessments and product development strategies demonstrate, the potential for further growth of forest cycling throughout Scotland. The regional strategies have recommended capitalising on an opportunity for a network of purpose-built mountain bike facilities and forest cycling routes which recognise the importance of sustainability, access for all and integration. The cycle development potential has been assessed for each area, based on market requirements and the need to create a critical mass of facility with good links to wider tourism destinations whilst at the same time addressing social / community needs. If successfully achieved, this will maximise overnight visitors, boost economic benefit at a local and national level and improve social inclusion and health.

In many areas forest cycling and mountain biking is a positive asset for a rural community, not only in terms of its economic potential, but also creating facilities for local people to use and to get actively involved in trail construction / management in partnership with FCS. Cycling also has very positive benefits for outdoor education, social inclusion, health and improving community involvement.

Scotland continues to grow as a short break destination and activities are an extremely important part of the Country's tourism portfolio. This, together with FCS' current cycling success, the new access legislation and the Scottish Executive's health agenda, provides a very positive climate for further development of good quality forest cycling and mountain biking on the National Forest Estate.

5.2 Building on Success

The role of this framework is to guide forest cycling and mountain biking developments over the next five years (2006-2010). It will, in turn, build on the successes of Phase I of the FCS' 7stanes mountain bike development in Southern Scotland and capture the enthusiasm and impetus created by the World Cup Downhill, Cross-Country and 4-Cross events held at Fort William over the last four years. Forest cycling and mountain biking should also build on the opportunity and potential legacy created by marketing and promoting and the staging of the forthcoming World Mountain Bike Championships at Fort William in 2007.

This ambition requires a vision and a strategy which is capable of maximising the potential of forest cycling and mountain biking as a recreational resource. This framework adopts a market-led approach which aims to give the visitor a high quality recreational experience, whilst ensuring development consistency and forest sustainability.

This strategic ambition is concerned with ways in which the following outcomes can be achieved:

Strategic Outcomes

- Creating more wealth and jobs for Scotland's rural areas in particular in the management of the National Forest Estate;
- Promoting a positive image of the role of a modern FCS;
- Enhancing the quality of life and health of Scotland's communities;
- Using recreation and cycling to attract greater visitor access, to promote a greater appreciation of Scotland's forest and woodland assets;
- Attracting more visitors from outside Scotland to visit forests, as part of their Scottish short break experience;
- Encouraging more Scottish residents (particularly those in the Central Belt) to utilise forests for cycling;
- Creating and sustaining a high quality, well managed, world-class cycling product;
- Increasing visitor expenditure, length of stay and out of season visits.

5.3 A Vision for Forest Cycling and Mountain Biking

The main thrust is to further develop sustainable cycle opportunities on the National Forest Estate attracting a wide range of new visitors / markets who appreciate FCS assets.

Forest cycle products, if positioned as an integral part of wider tourism destinations, offer the potential for considerable economic benefit / spin-off for communities, particularly in rural areas of Scotland.

The future Strategy should therefore be based on the proposition that cycling and mountain biking on the National Forest Estate in Scotland, as part of the recreation offer / portfolio, can be developed and promoted around a core vision:

“to create an accessible national network of world-class sustainable forest cycling and mountain biking products. These products must promote health, enjoyment and wellbeing for local residents and tourist visitors, whilst maximising economic potential for Scotland and its communities.”

There is an overriding need for a vision and strategic overview which will help to focus the aims and objectives of FCS’ cycle development aspirations in tune with wider FCS recreational priorities / published objectives. This should be adequately reflected in National and District recreational strategies of which forest cycling and mountain biking is only part.

In addition, there is also a need for a framework which will help to deliver a consistency of approach to ensure product quality, trail sustainability, management / maintenance, safety, visitor communication / interpretation etc. Whilst a uniform management approach is being suggested, the mountain bike trail product range must still have and retain distinctive local and regional identities. Each trail / route will be strengthened if it is “uniquely different”. Different: terrain, flora / fauna, views, landscape character, natural and manmade features / linkages etc.

A strategy and vision must therefore enhance the need for greater central control and management policies whilst, at the same time, ensuring the key features of each trail product remain unique. This will help to create added destination appeal and boost market demand whilst respecting a sense of place and the needs and aspirations of local communities and other forest users. The vision should also consider how mountain biking and forest cycling facilities can be the future catalyst for improved economic activity / growth for local businesses.

6 GUIDING PRINCIPLES

A future strategy must seek to guide the long-term management and development of forest cycling and mountain biking on the National Forest Estate in Scotland. A strategy to achieve this vision must be multi-faceted with sustainable products, economic benefits, health and wellbeing of the local communities and an integrated FCS recreational resource all significant underlying aims.

The document has adopted the following seven principles to guide the strategic aims, objectives, policies and actions:

(i) Sustainability

One of the overarching principles for the Forest Cycling and Mountain Biking National Strategy is sustainability. In terms of cycling, sustainability refers to use of the forest resource, trail development and its ongoing maintenance and management, sustainability of market demand and economic benefit. Each forest cycling and mountain biking development should embrace high standards and values in environmental responsibility and sustainable tourism / visitor development. Route planning and visitor management must take account of fragile habitats, key landmarks and conservation issues.

(ii) Access for All

A cycle resource which is accessible to all (Disability Discrimination Act compliance) which will promote fun, confidence, health, wellbeing and quality of life for Scotland, its residents and visitors.

This ensures that forests and their built cycle products are accessible to the widest possible range of people. This approach should influence product development, marketing and management practices.

(iii) Market Awareness

Forest mountain biking and cycle product development must be marketed. The right range of cycle products must be offered at the right quality and skill level to satisfy visitor expectations in relevant cycle markets.

An understanding of visitor requirements and market segmentation is necessary. The importance of visitor destinations, local needs and opportunities and wider links to other types of recreation is key.

(iv) Integrated Destination Resource

Visitors visit destinations. Forest cycling must be viewed as an integral part of a wider tourist destination as well as a forest recreational offering. The positioning and development of a cycling product must be integral to other wider forest recreation facilities and activities. External / internal communication, marketing strategies and management policies must all promote this. This will ensure that the access for all principle is maintained and the economic development principle maximised at a wider / local community / destination level – boosting wider visitor markets and increasing length of stay, repeat visits.

(v) Prosperity, Wealth and Community

A key benefit of forest cycling and mountain biking is indirect economic 'spin-off', ie attracting visitors and tourists to spend in the wider area. Forest cycling can create new local business opportunities. Future links to the private sector to maximise business opportunities must be explored. Community linkages are particularly important in rural areas where a cycle development can create a local need for accommodation, refreshment and wider activities.

In many instances forest cycling is also an important resource for a community's youth, improving social wellbeing / health and promoting confidence and belonging.

(vi) Affordability

To date most development on the National Forest Estate has been paid for by the 'Public Purse'. The benefits of this expenditure have been indirect economic impacts to rural communities in particular. In the future, by attracting a wider range of markets, health, social inclusion and wellbeing benefits will increase. A clear focus of a strategy where future funding is constrained / limited should be consideration to complete existing sites before progressing to new developments. However, this approach needs to be balanced against cost / benefit at a national level.

Future development must take place at a pace which FCS and its partners can afford now and in the future.

(vii) Health and Safety

Health and Safety is viewed as a key guiding principle for the Strategy and this is a philosophy which should encompass all development and management practices on the National Forest Estate.

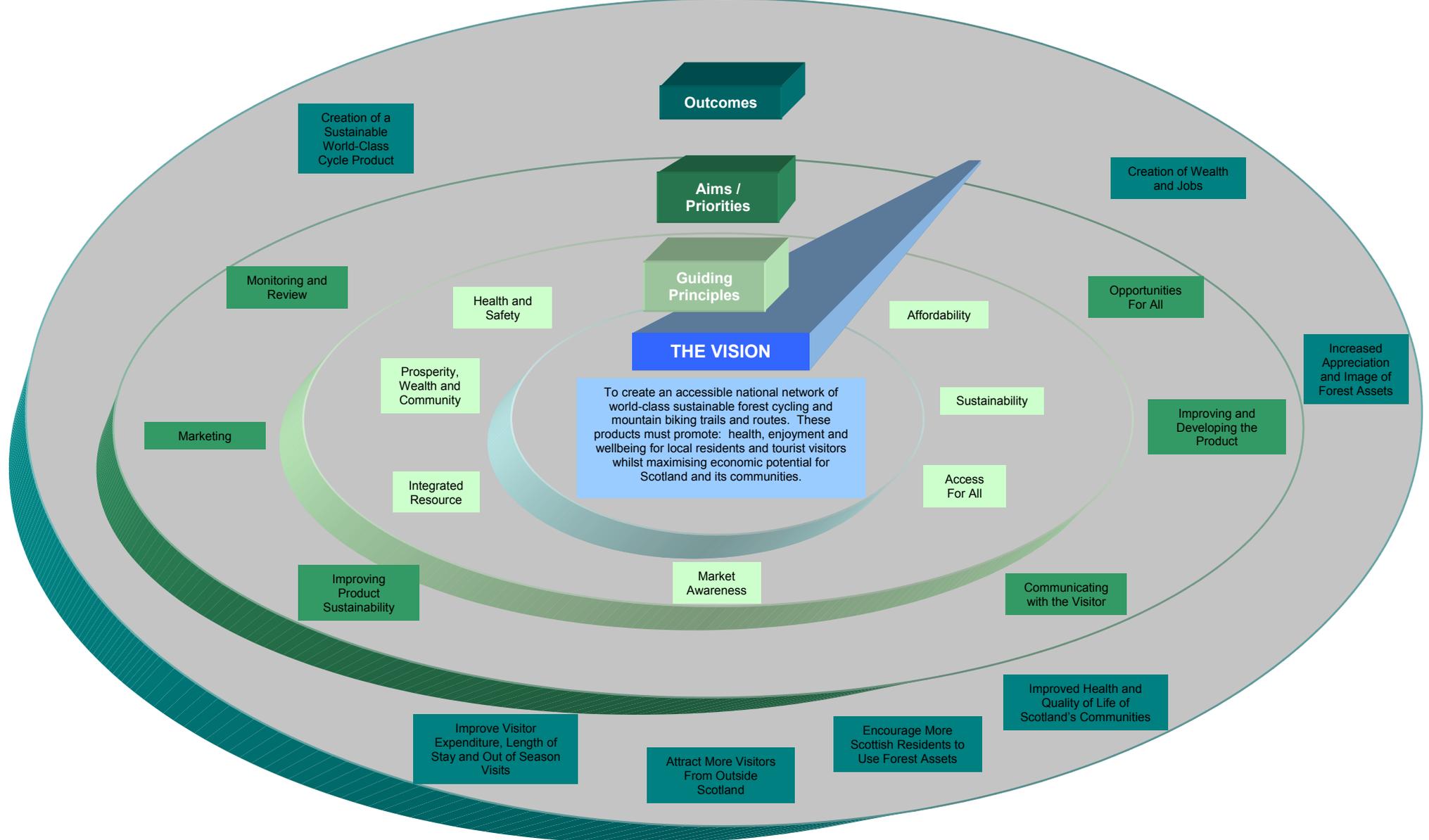
Forestry Commission Great Britain seeks to refine its Health and Safety policies, practices and record keeping for recreation. The importance is to increase the visitor's awareness and responsibility for Health and Safety so that risk can be better controlled in future.

7 STRATEGIC AIMS AND PRIORITIES – ACTION POINTS

Guiding principles are a prerequisite to help guide any strategy. In order to deliver the vision a number of key strategic aims / priorities must be set. These strategic aims and priorities must link to various themes for action under the Forest Cycling and Mountain Biking National Strategy.

STRATEGIC AIMS / PRIORITIES	
Aim / Priority	Description
1. Maximising Opportunities for All	Build on the success of the 7stanes product and the opportunities / potential created by FCS to provide a cycle recreation and mountain bike product which is accessible with opportunities for all, promoting health and wellbeing.
2. Improving and Developing the Product	Create a 'world-class' forest cycling and mountain biking product which will attract people from outside Scotland to visit and encourage short breaks. This will maximise the economic benefit for Scotland and its local communities through the development of forest cycling and mountain biking.
3. Communicating with the Visitor	Improve communications with visitors in regards to information, interpretation, route grading, increase visitor enjoyment, health and safety, and better visitor management.
4. Improving Product Sustainability	Ensure that the cycling product, as part of wider forest recreation resource, is sustainable for the future. Improving maintenance, management policies and practices – promoting good design, ensuring markets continue to visit.
5. Marketing	Positively promote and maximise the use of the National Forest Estate as a key cycling and wider recreational resource for Scotland and its communities.
6. Monitoring and Review	Improve the measurement and the monitoring of the forest cycling and mountain biking developments and their contribution to the Scottish economy and ability to improve health and wellbeing.

A Strategic Framework



7.1 Aim / Priority 1: Maximising Opportunities for All

Build on the success of the 7stanes product and the opportunities / potential created by FCS to provide a cycle recreation and mountain bike product which is accessible with opportunities for all, promoting health and wellbeing.

- **Market Segmentation** - Be market-led, ensure that forest cycling and mountain biking is presented / promoted to a wide user base – developing products to satisfy various market needs and wants – visitors, local residents, tourists etc.
- **Market Demand** - Establish method to quantify potential market demand to enable the appropriate facilities to be developed for the correct markets.
- **Widely Accessible Facilities** - To ensure facilities are used by a wide range of: local people, visitors, tourists with links to education and sporting excellence – introducing new markets to forest cycling. The benefits of forest cycling and mountain biking are also seen as health and wellbeing which fits with Government initiatives to improve the health of the nation.

7.1.1 Market Segmentation

The strategic emphasis for the future is to widen the market base and provide future facilities, particularly at entry level. Market segmentation is required to understand in more detail individual cycle market needs so the products can be well targeted and key target markets attracted. This helps to give a market-led approach to developments in the future where to date, the first phase of development at most purpose-built mountain bike sites as one would expect with a new product evolutionary cycle has been largely supply-led (the 7stanes and Laggan Wolfrax developments are two prime examples of this, although responding to local ambitions). Signature / icon trails have been developed, marketed by word of mouth, by enthusiasts, aficionados and then a further network of trails built on the back of those initially developed routes.

In the future there is a danger that individual sites may compete with one another if product and market differentiation is not undertaken and development controlled. Supply of facilities could outstrip demand as displacement begins to become a more visible problem. However, with the 7stanes Phase II development, visitors have been asked the type of facilities they would like to see added to the core product. At Glentress the new visitor centre will only be finalised after user consultation.

To date the forest cycling and mountain biking market has not been properly segmented and this requires some consideration with links established between future market requirement and product development. Markets and products can be segmented in a number of ways, by:

- type of user;
- skill level and technical ability;
- time – pattern of use;
- geographical location;
- user motivation – thrill seeker / fun factor;
- experience required;
- age, sex;
- type of visitor – day, short break, holiday tourist etc;
- group, individual etc.

The Welsh have segmented their market by trail user group and a similar segmentation system is suggested for Scotland. The matrix overleaf is a market segment breakdown and shows: a description of each segment; their broad skill level; likely experience dwell time; and the type and grade of route preferred.

The key benefit of market segmentation is to understand what various markets want given their key motivations, skill level and the time they have available for the experience. Market segmentation should be actively used by FCS to guide future product development. A system of market segmentation, visitor monitoring and visitor qualification should be put in place. This can be used to help avoid product duplication and demand displacement. Regional products can be developed for specific target markets.

MOUNTAIN BIKE MARKET SEGMENTATION

Market Segment	Description	General Skill Level	Dwell Time	Route Type	Route Grading See Aim / Priority 3 – Communicating with the Visitor
Novice / Casual Cyclist	New or limited 'off-road' cycling experience, taster activity sessions, provide other wider activities / entertainment in the forest, link to local attractions.	Low	1 / 2 hours	Gentle, short ascents / descents, rest areas, forest roads, wider single tracks, few obstacles / 'chicken runs', café, toilets.	Green / Blue
Family / School / Youth Group	Mixed ability groups, opportunity to improve skills, training, safety an important issue, objective setting.	Low / Moderate	2 / 3 hours	As above but additional obstacles and moderate safe thrills options, more and narrower single track for more advanced members / 'chicken runs', skills areas, jump parks, fun, tuition.	Green / Blue / Red
Enthusiast	Various skill levels, keen to ride signature trails, trail baggers, includes high skilled group that love obstacles, drop-offs, have all the latest kit, like to be seen.	Low / Moderate / High	2 / 4 hours	As above but need signature trails, like comfort of manmade trails, graded skill parks, bike shop – meeting place to be seen ie café.	Blue / Red / Black
Cross-Country / Epic / Endurance Rider	Love long routes, own navigation, solitude, nature, challenge, miles of connecting loops with natural features such as river crossings, arduous sections of technical and physical challenge.	Moderate / High	4 / 6 hours	Tend to cycle in wilderness, will utilise manmade trails to connect long cross-country routes, no central facilities necessarily, would use if available – self-sufficient.	Red / Black
Downhiller	Specialist downhill bikes, sophisticated specialist equipment, very steep descents, large obstacles, 'gravity junkies', need uplift system to prevent pushing heavy bike uphill, body armour, freeride and 4-Cross.	High	2 / 3 hours	Specialist downhill course, highly specialised, big drop-offs, technical difficulty, rock sections, steep.	Black / Double Black
Sprinter	Competition-based performance riders, particularly cross-country focused, would include 4-Cross.	High	1 / 3 hours	Short, steep cross-country, 4-Cross courses, technically / physically, difficult sections.	Black / Double Black
Trials Rider	The outer parameters of mountain biking. Trials are as much akin to BMX cycling as it is cross-country mountain biking – for high adrenaline riders only. Very often a spectator show as part of larger mountain bike event.	Very High	1 / 2 hours	Short, sharp very high octane-type development – technically very difficult constructed trials North Shore etc.	Specific / Specialist Individual Designs Only
Freerider	A growing but 'extreme' sector of the sport – high adrenaline, fun orientation, session riders, would include elements of enthusiasts and downhillers.	High / Very High	1 / 2 hours	Short, sharp riding and adrenaline, drops / berms, tabletops, North Shore, riders session, parts of downhill / cross-country courses, fun / jump parks.	Fun / Jump Parks – Red to Double Black Route With Large 'Air' Features

Each of the market segments identified previously could engage in forest cycling and mountain biking as part of:

- a short trip – less than three hours spent away from home;
- a day trip – more than three hours spent away from home;
- a short break – usually two to five nights spent away from home;
- a main holiday – usually seven or more nights spent away from home.

In terms of the economic benefit to an area / region, a visitor undertaking a short trip – less than three hours – may spend very little in the local economy. There could be some travel and there might be some opportunity for refreshment. However there may be no spend at all if the facilities are very close to home. A day visitor however (more than three hours away from home) generates economic spend. The overnight visitor is the most beneficial to the economy at a local, regional and national level. In general terms, an overnight visitor might spend three or four times that of a day visitor. It is important that the economic potential of various cycle recreation markets is understood. A key strand of this framework is to maximise the opportunity for economic benefit and as a result facilities which appeal and target the overnight tourist market are given a greater priority than local facilities attracting mainly day visitors.

VisitScotland recognise that the overnight cycle tourist market is further segmented into cycling holiday tourists and those cycling as a recreation activity when part of a wider holiday. Traditionally, cycling holiday tourists were mainly long-distance touring cyclists [Lands End to John O'Groats, Long-Distance Cycle Network (Sustrans), organised cycle tours etc]. However, with the development of purpose-built mountain bike facilities, this market has changed and will grow in the future. Tourists are now visiting these facilities or a number of these facilities as part of a holiday or short break. Many of these visitors tend to be proficient in mountain bike skills / cross-country / downhill. Where the biggest opportunity lies for FCS is capturing the potential growth in this cycle tourist market to a number of existing and new facilities.

The 'cycling whilst on holiday' market is significantly larger however, and offers even greater opportunities – but key products must be developed, aimed at novices, casual cyclists, families, older cyclists and the less serious / less skilled 'off-road' cyclists to capture this demand.

In general terms, Scotland has five times as many tourists who cycle on holiday compared with cycle holiday tourists (2003). The FCS regional product development strategies have been devised to capture the potential growth in this demand. VisitScotland and FCS commissioned further visitor research in 2005 to improve their understanding of the cycle holiday market to Scotland. The results of this research have been included in Appendix XI.

7.1.2 Market Demand

Introduction

It is extremely important that the demand for mountain biking is understood at a national as well as a local / community level. The level and accuracy of the number of people who actively cycle 'off-road' is unknown. In order to help guide the scale and scope of future forest cycling and mountain biking developments, the level of market demand has to be profiled and quantified.

At a national level, at least 60% of households in the UK now own a bicycle. The number of new bike sales grew rapidly in the late 1990s early 21st Century but has since fallen back. Mountain bike ownership is still at its highest level but sales are constrained to people upgrading and replacing. There are a lower number of new entrants.

Market Profile

The market profile has been broken down by the type of demand for the two key facility types: *forest cycling* and *purpose-built mountain bike facilities* as follows:

FOREST CYCLING MARKET	
Market Segment Characteristics	Market Trends / Opportunities
Tend to be older cyclists and mixed sex groups.	Majority of demand occurs at the weekend and during the summer – tend to be fair weather cyclists.
Evidence of family groups with younger children.	Gentle, safe cycling demanded, shorter routes suitable for 'tagalongs'.
Long-distance cycle touring market.	Routes part of longer network (see National Cycle Network).
Fitness market.	Circular routes – physical rather than technically challenging.
Epic rides.	Riders capable of all day in the saddle. Like long challenging routes with good views.
Tourist visitors.	Forest cycling attracts a greater number of tourist visitors cycling as a recreational experience whilst on holiday.
The forest cycling product is outdated and poorly used, not seen as contemporary.	Opportunity to re-brand and integrate forest cycling with purpose-built mountain bike facilities.

PURPOSE-BUILT MOUNTAIN BIKE MARKET	
Market Segment Characteristics	Market Trends / Opportunities
Groups of between four and 10 adults.	Majority of demand occurs at the weekend.
Local bike clubs have mountain bike sections.	Organised rides throughout the year, often two per week from May to September.
Most users are male aged between 20 and 45.	Demand is evident year-round although it does peak in summer months.
Most users are A, B, C ₁ , C ₂ , social class and relatively affluent.	Most users have their own transport ie cars and live one to two hours from the site.
Most users are in full employment.	Word of mouth, personal recommendation has been the best marketing tool.
Most users report intermediate or expert skill levels.	Mountain bikers also tend to participate in a number of other sports ie walking, running, skiing, snowboarding.
Most users are currently enthusiasts and aficionados.	There are currently few novice riders to purpose-built facilities.
Most users have visited purpose-built trails to ride signature trails.	The family market is untapped and underdeveloped.
Some community facilities have developed a growing number of schools, youth users.	It is anticipated that the growth in purpose-built cycle facilities in Scotland, together with emerging new initiatives will attract a greater proportion of novice riders, families and groups.
Large proportion of demand is generated by Central Scotland residents as day visitors.	The geographical location of a site has an influence on the market it attracts and the proportion of overnight visitors.

Day Trip Demand

In order to capture the growing demand opportunity for 'off-road' cycling at a national level, it is important that Scotland has a good network of regional and community forest cycling and purpose-built mountain bike facilities. Strategically these facilities must complement one another to reduce demand duplication and displacement but at the same time maximise access opportunities for all.

At a regional level, detailed demand displacement tests have been carried out. A quantification of the potential number of cycle trips from key facilities of population across Scotland has been calculated (see Appendix I).

Research has revealed that cycle routes which are located close to a person's residence will be used much more often (many more repeat visits) than those which are located further away. This highlights the importance of the local resident population in generating demand for purpose-built cycle facilities ie those facilities located close to large centres of population will attract a high volume of users and a high volume of repeat visits.

It is well known through previous visitor research that mountain bike enthusiasts will often travel two to three hours to visit a cycle venue. However, in order to avoid duplication and displacement where a network of facilities has been developed across Scotland an average drive time of only one hour has been applied.

The resident population within a one-hour drive time of each forest in Scotland has been quantified. This has been based on average drive times during the day. Different average speeds have been adopted depending on class of road ie motorway, 'A' road, unclassified etc. It has been assumed that 6% of the local resident population in Scotland participate in mountain biking as a sport. This assumption can be tested by further visitor research in the future.

It is estimated that people who actively participate in mountain biking as a sport, on average, take between five and 10 trips a year (the midpoint of this range ie 7.5 trips).

Details of the one-hour drive time populations from each forest facility and key centres of population are shown in Appendix I.

Overnight Tourist Demand

In addition to local resident demand, there will be demand from overnight tourists who are staying within an hour of each forest facility. It is unlikely that tourists will travel from their overnight base for more than one hour to reach a facility. As previously outlined, there are two types of cycle tourist – tourists on a cycling holiday and tourists who cycle whilst on holiday.

At a regional level, the number of overnight tourist trips are broken down each year in the United Kingdom Tourism Survey (UKTS) and the International Passenger Survey (IPS). Estimates have to be made for each facility as to how many tourists stay overnight within a one-hour drive of each forest.

National research has demonstrated that at a national level, on average 8% of tourists cycle whilst on holiday. Over time, given increased product development, marketing and promotion, it is likely that the number of tourists who cycle on holiday will increase. It has therefore been assumed that 8% of the overnight tourist population around a forest would potentially cycle whilst on holiday. This overnight tourist demand is strategically important in generating economic benefit for rural areas.

The Penetration Methodology and Criteria

In order to estimate / quantify potential demand to individual forests a penetration methodology is applied to local resident and overnight tourist markets.

Every tourist or leisure facility, whether it be a swimming pool, cinema or visitor attraction penetrates its market to a greater or lesser degree. The level of penetration applied will depend upon a whole host of tangible differences / variances re quality of attraction, reputation of attraction, facilities offered by attraction etc. In other words an established / quality product will penetrate its market potentially much more than a similar product with more limited market appeal.

Indeed, in mountain biking terms, Glentress has a high penetration level for the day visitor markets and this is a direct result of its 'fit' with the markets demands / requirements ie product quality, scale of development, access, brand, proximity to Edinburgh and the North of England markets, and central facilities (ie the Hub, now with separate brand 'the Hub in the Forest'). It is these positive factors which give Glentress such a high penetration rate / share of the day visitor market. Market penetration analysis is not an absolute science; an element of judgement has to be applied to this methodology.

A breakdown of the penetration 'influences' used to calculate usage patterns of individual forests are detailed below.

PENETRATION RATE – 'INFLUENCES'	
Type	Description
Destination	- Overall strength as a visitor / tourist destination, level of appeal / impression / reputation, etc;
Captive Market	- Loci, level of competition in area, level of difficulty in attracting market, distance to next venue, degree of other / linked recreation experiences in the area;
Tourism Infrastructure	- The cluster effect ie level of wider market offering – tourism / recreation, services facilities re accommodation, brand etc holistic / interlinked v fragmented;
Transport / Access	- Level of supporting transport infrastructure / appeal as an access destination ie easy access v remote. Public transport links;
Linkages	- Links to other tourism / service facilities in the wider area re food and drink / accommodation, visitor attractions, activity provisions etc;
Day / Half-Day Experience	- Value / length of stay / other facilities, linkages to other similar facilities / critical mass opportunities / synergy;
Distance From Market	- Loci / transport / convenience / population catchment, access to markets;
Urban and Rural	- Appeal / remoteness / attractiveness, access;
Overnight Potential	- Economic impact – high / low level benefits;
Accommodation Potential	- Product quality, offering, suitability, price;
Product	- Scale, size, quality / differentiation / appeal / range of developments;
Market	- Scale, size, shape, dynamics;
Skill Level of Market	- Requirements / linkages / facilities;
Breadth of Market	- Appeal / number of different target markets / growth opportunity, niche v mass market;
Inclusive Not Exclusive	- Social / community / health / wider impacts / benefits.

Note: Each individual forest must be evaluated against these penetration influences on the basis re level of positive or negative impact. These criteria are then used to set the penetration rates for each forest area calculated.

Given the criteria outlined above, the penetration rates used can vary greatly from one forest to another. Market penetration rates can vary from about 5% to 50% for the local resident market and overnight tourist market depending on the type of facility offered. In addition, there is also the possibility for repeat visits amongst the local population based on the type, scale, quality of the facilities. A quantification of the potential number of users to each forest product is outlined in Appendix II.

7.1.3 Widely Accessible Facilities

New Target Markets

A key thread of this framework report is to make forest cycling and mountain biking facilities widely accessible to a broader range of markets. At present purpose-built mountain bike facilities are seen as being a bit exclusive, appealing to a rather narrow market base ie fit 'middleclass' males aged 20 to 45.

The key opportunities to grow the mountain bike sport and make it more sustainable in the future are to attract / target a wider range of markets to use the national forest asset for cycling.

A greater proportion of:

- tourists;
- novice / entry level users;
- women;
- families;
- older cyclists;
- education / youth and activity groups;
- socially excluded / disadvantaged;
- communities and clubs.

By targeting these groups there will be a greater range of benefits to Scotland and its communities including:

- greater economic benefit to a wider range of communities;
- improved health and fitness of Scotland's residents;

- building confidence and achieving goals for youth;
- improve awareness of forest assets;
- introducing disadvantaged residents to sport / activity and health.

In order to attract these target markets, mountain bike product development will have to be widened.

It has been recognised that the first phase of the 7stanes development was perhaps too exclusive. The second product development stage strives to widen the market base by developing more entry level routes and skills areas. The appointment of a cycle ranger at Glentress is an example to help external liaison and new market development.

In addition, the focus on purpose-built, the re-branding and developing of the 'traditional' forest cycling products will help to widen market appeal. There is little doubt that purpose-built forest mountain bike facilities are very intimidating to some markets, particularly novices, families and older cyclists. Fully integrated products, where purpose-built mountain facilities are linked to other cycle routes in addition to wider forest recreational offerings, will help to widen market appeal and improve accessibility.

Promoting Health and Wellbeing

In 2004, the Scottish Executive announced two major funding initiatives that would benefit woodlands:

- A Scotland-wide initiative, Woodland in and Around Towns (WIAT) challenge fund totalling £3.5 million to 2008. This fund is aimed at bringing woodlands back to life in the urban fringes. Towns with a population greater than 3,000 can regenerate their woodlands for the benefit of the public; and
- The Central Scotland Forest Project will receive £4 million to 2008 encouraging the development of new woodlands around the urban areas of Central Scotland.

In addition, the Scottish Executive is also promoting the National Physical Activity Strategy and the healthy living campaign, which could unlock sources of funding if linked through Community Partnerships and Community Planning for forest recreation developments.

The Big Lottery Fund's Active Futures – Scotland, could also be a source of funding for disadvantaged youngsters to get involved in sport. These various initiatives give opportunities to provide facilities to improve the health and wellbeing of disadvantaged communities.

Forests in around towns are ideally suited to improve the fitness and wellbeing of communities around them.

FCS should work with Community Partnerships to increase access to its recreational offering. In woodlands there is an opportunity to develop a network of easy and short walks and cycle routes ie multi-user trails, close to residential areas to help boost health and quality of life.

Where there are recognised youth groups and local demand for cycling, other well-focused products could be developed in partnership, targeted at the young and disadvantaged. Long-term sustainability of these more specialist products is an issue and this would have to be addressed at the facility planning stage.

In Pursuit of Performance Excellence in Cycling

Sportscotland's role is to increase the population's participation in sport to ensure sport is widely available and ensure the Country achieves and sustains world-class sporting excellence. They will support Scottish Cycling in achieving their sporting aims (see below).

In terms of mountain biking, Sportscotland has previously invested in the downhill course at Leanachan, will support the national cycling facilities promoted by Scottish Cycling, and have invested in improving skills facilities for trail and mountain bike cycle leaders at Glenmore Lodge.

Their main focus in the future will be through the Active Schools programmes, Sports and Lottery funding governance and development and action of the strategic plan.

If forest cycling and mountain biking are to be 'world-class' they must be supported by 'world-class' skills and performance training and education.

FCS has responded to the need to improve 'off-road' mountain bike skills by introducing interpreted skills loops at a number of facilities – see Glentress and Kirroughtree. These skills loops are largely used by self-taught individuals, honing skills, improving confidence etc. The skills loop is also used at Glentress to teach children (see Saturday Kids Club).

One of the biggest criticisms from both schools and outdoor education centres is that mountain biking is seen as purely a fun recreation activity. There are no widely recognised structured goals / award schemes eg see Kayaking Star or Rainbow Scheme (Scotland). This therefore limits the ability to introduce cycling / mountain biking as a formal activity compared with say watersports activities which have recognised schemes.

The cycling governing body is Scottish Cycling which is responsible for developing cycling as a performance sport and as a result monitors all cycling disciplines, road and track cycling, mountain biking, BMX, Cyclecross etc. Scottish Cycling's key focus however is the performance side of the sport. Scottish Cycling has 105 affiliated clubs and 2,300 individual members.

Scottish Cycling also administers the British Cycling Go-Ride scheme, the aim of the scheme is: "to create a network of community cycle clubs that are trained resources and skilled to meet the challenge of integrating young people into their club structure".

The Go-Ride scheme is for 6 to 18 year olds – a partnership between cycle clubs, schools and Local Authorities.

The primary scheme is aimed at 6 to 12 year olds and incorporates Gears 1 and 2 – basic bike handling skills, confidence and fun activities for the playground, playing field. It focuses on six cycling skills and also considers safety, clothing, food and basic cycle maintenance. This scheme would operate prior to the formal cycling proficiency test.

Gears 3 and 4 are for older secondary schoolchildren and build on the early Gears programme.

FCS should work in conjunction with Scottish Cycling and Cycle Scotland and outdoor education authorities to develop a Go Mountain Biking Scheme. This should be a modular scheme delivering various levels of the following:

- Skills Development;
- Cycle Maintenance;
- Safety;
- Navigation.

This scheme could be delivered at either recognised FCS mountain bike facilities or outdoor centres by a range of accredited tutors.

Scottish Cycling already delivers trail cycle and mountain bike leadership courses through the Scottish Mountain Bike Leader Award Scheme.

Scottish Cycling is also developing six regional cycling academies throughout Scotland:

REGIONAL CYCLING ACADEMIES	
Cycling Academy Sites / Location	FCS Potential Partners Sites
West of Scotland, Bellahouston Park, Glasgow	Queen Elizabeth Forest Park / Ae
East of Scotland, Meadowbank, Edinburgh	Glentress / Kinoul Hill
Tayside, Caird Park, Dundee	Craigvinean
North of Scotland, Nevis Range, Fort William	Leanachan
Central Scotland, Stirling	Queen Elizabeth Forest Park
Grampian, Aberdeen	Pitfichie

Each of these regional academies will have access to a range of cycling disciplines and have one or two key specialisms. There is an opportunity in the strive for 'world-class' recognition for FCS regional mountain bike facilities to support the Olympic performance cross-country discipline and its future development.

Strategically FCS should work in partnership with local cycle clubs and Scottish Cycling to achieve these goals.

7.1.4 Action Points

The action points under **Aim / Priority 1: Maximising Opportunities for All** are as follows:

Priority Area	Strategic Action
Market Segmentation	Ensure that all future development is market-led. Undertake market segmentation, methodology based on sound knowledge and understanding of customers.
	Identify key target markets for individual developments to help differentiate the product. Ensure correct facilities are developed for correct market, part of regional strategy.
Market Demand	Quantify demand levels for individual facilities and forest sites. Support innovative approaches to maximise demand from overnight visitors and widen appeal of forest resources re tourism / recreation / destination appeal.
Widely Accessible Facilities	With partners, ensure that cycling is part of wider recreational offer ie WIAT initiatives particularly for Aberdeenshire and Scottish Lowlands.
	Work with partners to ensure cycling is accessible to a wide range of markets.
	Ensure image and messages on forest cycling are attractive to novices, families, older cyclists.
	Work with partners at national and community level to identify social inclusion and health opportunities ie where cycling and wider forest recreation can deliver wider benefits.
	FCS to work with outdoor education sector and Scottish Cycling et al to develop a 'Go Mountain Biking' award scheme.
	FCS to work in partnership with Scottish Cycling in pursuance of excellence to ensure regional academies have competitive mountain bike focus.

Note: See Appendix XIII for complete action plan.

7.2 Aim / Priority 2: Improving and Developing the Product

Create a 'world-class' forest cycling and mountain biking tourism product which will attract people from outside Scotland to visit and encourage short breaks.

In order for FCS to create a 'world-class' forest cycling and mountain biking product there are a number of ways in which the cycle product will need to develop in order to respond and satisfy market needs and opportunities. A key guiding principle is market awareness and a market-led approach.

The key strategic issues to ensure the aim / priority to create 'world-class' cycling and mountain biking facilities are as follows:

- **Cycle Destinations** - A test for wider linkages to maximise tourist experience credentials.
- **Strategic Positioning** - A strategic guide to the scale, focus and emphasis of purpose-built mountain bike facilities.
- **Product Development Opportunities** - The range of appropriate cycle products available for development.

7.2.1 Cycle Destinations

FCS is helping to develop and grow Scotland's leisure / recreation and outdoor visitor markets. The level to which forest cycling continues to expand will depend upon the extent to which forest cycling products can fully integrate and grow in parallel with market demand and other tourism and infrastructure products and services. The wider tourism destination and its growth and success will impact on forest cycling in the future and not just the scale and quality of cycle product provision alone. A forest cycle facility of regional significance will only perform at its optimum level if promoted and linked to wider tourism destinations with a range of visitor infrastructure / facilities as destination competencies.

The wider tourism opportunities will distinguish a community facility from a regional facility, giving the possibility to attract a significant number of overnight visitors from outside the area. Strategically, if forest cycling can fit well with both VisitScotland / Active Scotland's priorities and Scottish Enterprise's market-led destination approach, then there is a greater chance of tourism / visitor success and wider economic benefit being realised.

Regional forest cycling facilities should be viewed as cycle visitor destinations and links to local accommodation, café, shops, attractions, other activities, etc is of paramount importance to create the destination experience.

At a community level the cycle tourist destination credentials together with the social impacts should be tested. This will help to gauge the facility's strategic positioning.

In the development of the product strategy, four destination tests have been performed.

Destination Tests

- High cycle or tourism destination awareness;
- Level and quality of immediate tourism infrastructure;
- Breadth of market appeal;
- Range of potential links to create holistic cycle experience.

Cycle Destination Model Links to Wider Tourism Infrastructure



7.2.2 Strategic Positioning

The development of purpose-built 'off-road' single track cycling facilities must fall under one of four broad strategic categories. These are:

- (1) National;
- (2) Regional;
- (3) Community;
- (4) Clusters [combination of (1)-(3) facilities possible ie creation of destinations].

The categorisation and strategic positioning of forest sites will help to provide a guide to the scale of development and the expenditure required and national prioritisation, based on the range and mix of markets that each type of facility will attract.

It is important to provide a clear definition of the cycling facility 'types' to help guide and inform future development. The 'off-road' purpose-built forest cycling facilities should be based on the following criteria:

- Geographical focus – ie only one regional facility in each predefined area, to minimise displacement and market demand overlap;
- Types of facilities must relate to the size / scale of market catchment – demand potential / opportunity;
- The suitability and topography of the site must be considered as this may limit certain types of trail development and limit sustainability;
- The forests' alignment to other leisure and recreational provisions in the areas ie linkages;
- The range and type of cycle markets to be attracted should be taken into account – novice / intermediate / advanced;
- The range of trail types and level of 'central facilities' provision which can be supported must be considered;
- The level of economic benefit ie local, regional, national and importance to a local area / sub-region should be assessed;
- The ability to attract overnight tourist visitors as well as local residents is an issue for appraisal.

A summary of the strategic positioning criteria is outlined overleaf. Appendix X details which categories each forest site is positioned within re national / regional / community.

SUMMARY OF STRATEGIC POSITIONING							
Market Segment	National	Regional	Community Type A	Community Type B	Community Type C	Through Route Cycling Link	Cluster
Key Markets	All markets attracted – local enthusiasts, cycle clubs, short break tourists, families, groups, schools – wide range of skill levels and abilities.	Wide market base, but not as wide as national facility.	Local enthusiasts / volunteers and cycle clubs.	Schools, youth groups, social inclusion markets.	Short break tourists, overnight visitors, families, groups / societies, activity centre-related.	Nation wide enthusiasts and short break tourists, day visitors, excursionists touring cyclists, adventurers. Likely to use cycle trails frequently.	By linking various geographically close facilities together, maximises the range of markets which can be attracted. Widens potential visitor experience.
Overnight Visitors	Attractive to short break visitors from outside the region and outside Scotland.	Attractive to short break visitors from inside and outwith the region.	Primarily local VFR-driven.	Limited overnight visitor potential from individuals, but some group potential.	Attractive to short break visitors – primarily from outwith the region.	Opportunity to benefit from cycle 'stop-offs' during and between day visitors.	Critical to help promote overnight markets at smaller sites. Creates a destination focus.
Trail Network	Wide network of trails – novice through to advanced, all ranges of skill level required (green to black), cross-country and downhill / freeride, fun park and skills area.	Good network of trails, for mixed ability users, however, range may be targeted to specific markets, skill levels.	Trails built initially by volunteers tend to be niche / specialist for their own use ie technical downhill / freeride / cross-country.	Trails must be novice and beginner focus, short with viewpoints and resting places.	Wide network of trails – must be user-friendly for beginners through to intermediates to promote wider tourism visitation.	Wider range of trails / networks and links.	Maximises trail / product network and links. Could appeal to various skill levels.
Signature Trails	One or two key signature trails with dedicated branding and possibly commercial route sponsorship.	One signature trail, may have its own branding – will have key trail signature features.	May or may not have signature trails, but will have key signature trail features.	Unlikely to have signature trails, but points of interest and goals must be built into trail design.	Likely to have various signature trails and scenic views / point of interest to keep visitors interest high.	The route / views / landscape itself is the feature. Other local features within the forest in question could be developed.	Ability to link smaller facilities with larger facilities which may have signature trail. Helps with destination branding / promotion.

SUMMARY OF STRATEGIC POSITIONING (Cont'd)							
Market Segment	National	Regional	Community Type A	Community Type B	Community Type C	Through Route Cycling Link	Cluster
Events	National and world-class participant and spectator events. Linked to EventScotland National Events.	Regional participant events, limited spectators.	Local participant events.	Specialist themed events.	Likely to have little in the way of staged events.	Specialised themed events as part of through route – see charity, triathlon etc.	Opportunity to promote / widen more specialist events portfolio.
Central Facilities	Full range of central facilities: car park, downhill uplift, café, shop, bike hire, changing facilities, tuition, cycle ranger, shelters and picnic areas and toilets.	More limited facilities – if sustainable, small café and retail provided on site. If not sustainable, provision should be made in local area, no tuition facilities.	Central facilities unlikely to be commercially viable. Car park and shelters only. Toilets assessed on site by site basis.	As community facility type A more shelters and picnic areas provided groups will bring own trained cycle trail leaders.	No purpose-built facilities – but facilities linked to existing attractions / visitor destination / facilities are fundamental.	No centralised facilities, shelters and bothy-style, developments possible along route.	One central facility could satisfy more than one site. Link to local communities. Toilets, shelter required.
Economic Benefit	Strong links to business sponsorship deals, national and local economic benefit.	Links to local business, good regional and local economic benefit.	Local economic benefit.	Some limited local economic benefit.	Could be significant economic benefit linked to high percentage of overnight stays.	Economic benefit generated from 'stop-off cyclists' re accommodation / food and drink.	Creation of cycle destination. Boosts economic benefit. Provides greater opportunity to disperse economic benefit around region.
Social / Health Benefit	Meets Scottish level social and health agendas.	Regional benefit re volunteers and social inclusion.	Local social benefit re community volunteers.	High social benefit to local community, social inclusion-driven, high local health agenda priorities.	Meets with all UK social and health aspirations.	Significant benefits to all who participate however not assumed to be a mass market approach (see Sustrans).	Meets regional aspirations.
National Sports Academy Potential	Yes, develop with Scottish Cycling.	Some links possible.	No potential.	No potential.	Not potential.	No potential.	Yes, see cluster link to national / regional facility.

7.2.3 Product Development Opportunities

Introduction

Mountain biking is the new 'New Skiing'.

Mountain bike facilities are places to be seen and be watched, show-off the latest kit, wear the latest gear, chill-out with your friends, be cool. This is fast becoming the image at Glentress, Laggan Wolftrax, Kirroughtree where central facilities have been developed. Forest cycling and mountain biking as a whole however has a far wider number of benefits for Scotland than skiing:

- Can be carried out all year-round in Scotland;
- Is more accessible;
- Is less weather dependant;
- Has wider appeal to more markets;
- Is more sustainable;
- Can give wider economic benefit to rural communities;
- Offers greater links to other forms of recreation;
- Gives more opportunities for small business.

In preparation and in support of this framework document, cycle product development opportunities were identified in detail at Forest District level but these were not prioritised. Each forest has been considered for product development in light of potential market opportunities, forest structure, landscape character, environmental sensitivities and the ability for a forest to build destination credentials, links to wider recreation and positive social impacts. The infrastructure of creating a positive visitor / user experience has been considered in the context of a working forest.

At a national level there are key considerations:

- World-class / high quality trails;
- Access for all;
- Sustainability;
- Safety.

The products considered for future development have been based on the 7stanes models and recent facilities introduced at Laggan Wolftrax, Learnie Red Rock Trails and also benchmarks in Wales and overseas (see Appendices III, VI and VII).

Purpose-Built Mountain Bike Facilities

Essentially purpose-built mountain bike facilities currently offer two types of product:

- Graded trails aimed at cross-country cyclists built to IMBA standards and developed as 'stacked' loops;
- Downhill-only type trails for more extreme cycling with occasional or permanent uplift facilities.

In general, in the first instance, product development has been led by enthusiasts and aficionados and as a result more extreme facilities have been developed. This has created great awareness and good public relation opportunities in the specialist trade press.

Strategically there is a need to ensure future product development of trails are of the highest quality and of world-class standard. At the same time there is a need to ensure purpose-built mountain bike facilities attract a wider market base and are accessible to all. Therefore there is a requirement for trails that can be enjoyed by less skilled riders, children, older cyclist and less extreme facilities to be developed. This is certainly the focus of the 7stanes project Phase II developments.

The success of mountain biking in Southern Scotland has created demand for purpose-built facilities in other parts of Scotland. The most obvious product gap is the lack of facilities targeting a local Glasgow market (an estimated 1.4 million cycle trips generated by the population within one hour's drive time of Glasgow) or capturing the considerable tourist overnight demand for cycling in the West of Scotland. An estimated 750,000 cycle excursions generated by overnight visitors to the West of Scotland. There is also evidence that other tourism clusters / destinations around Scotland offer single track cycle product development opportunities. At a national level the strategic focus for future product development should be to fill these product gaps around tourism destinations.

FCS at a regional / community level is also getting development pressure for mountain bike facilities from local bike clubs and enthusiasts.

Where these facilities offer greater access to markets and where they can also be linked to social inclusion, health or education initiatives they should be given a higher priority nationally. However, it is more important for FCS to develop facilities in partnership with local interest groups to help control the quality, sustainability and safety of these facilities, even if these facilities are not of national significance. For these community developments FCS should minimise their capital expenditure and ongoing maintenance liabilities.

It is considered that over the next five years that an opportunity exists for a network of sustainable purpose-built mountain bike facilities which could be built throughout Scotland.

There is currently a lack of purpose-built formal downhill facilities with permanent uplifts (Nevis Range is currently the only facility). Temporary uplift facilities are provided for example at Laggan Wolftrax, Ae and Innerleithen at weekends.

Strategically the number of purpose-built, formal but more extreme downhill tracks should be limited. The SDA are concerned that formalising and developing the temporary tracks with full uplift facilities used for their events series will 'dumb down' their events. They would then look for new downhill venues.

There is potential for a limited number of more formalised downhill tracks in Northern and Central Scotland, but these may not necessarily be on National Forest Estate land, to be developed in association / consultation with the SDA and private sector investors.

Strategically downhill mountain biking should be made more accessible. As a result there are opportunities being considered at Glencoe and further developments are possible at Nevis Range, where there are permanent uplift facilities, to develop a route aimed at intermediate riders and this should be encouraged by FCS. At present the land for the downhill course at Leanachan is leased to the Nevis Range by Alcan (British Aluminium) or FCS.

Emerging Products

Cycle Trail Network

Rather than the recommended IMBA 'stacked loop' system of green, blue, red and black trails at each venue, there is an opportunity to create a web trail network ie a graded loop with a network of harder graded loops off it.

This has advantages of potentially being cheaper to build, easier to maintain, change and divert. It will encourage repeat visits and allow skills advancement. This approach should be strategically investigated with trail designers, particularly for smaller regional or larger community facilities.

Fun Parks

This product has emerged at forest venues – Laggan Wolftrax, Learnie Red Rock Trails and Kirkhill.

This product is viewed as an exciting addition, particularly for the younger market. It is also an accessible product where intermediate riders can roll and experts can jump. There are some concerns where this product is integral to cross-country routes. However it is recommended that this product is introduced more widely. Pragmatically fun parks should also be viewed as separate products – they should not be seen as just the exciting / intensive close of a blue / red / black route. Fun parks should either be ungraded or graded blue / red / black but importantly viewed as being separate from cross-country routes and interpreted products for riders from intermediate, advanced to expert – not novices. At present fun parks are integral to routes at Laggan Wolftrax, Learnie Red Rock Trails and Carron Valley. Development at these sites should be augmented to ensure there are appropriate route alternatives. For example:

- At Laggan Wolftrax an alternative finish to the red route considered;
- At Learnie Red Rock Trails, an alternative signed finish to blue route is needed / could be via forest road;
- At Carron Valley, a new ascent link to the fun park and return route from 'blue / red' trail needs to be built.

Strategically the fun park product could also be used as a substitute to the provision of accessible downhill tracks at cross-country venues throughout Scotland (see Laggan Wolftrax where the fun park facility now complements the World Cup Downhill track at Nevis Range).

Fun parks are probably most effective at venues with central facilities. The ability to watch users of fun park facilities from central facilities would boost café sales. A 'world-class' fun park should be considered in the future at Glentress which is visible from the new central facilities. Fun parks are potentially good facilities for introducing into woodlands around urban areas under WIAT initiatives.

Skill Areas / Loops

Interpreted skill loops have been introduced at Glentress and Kirrourtree. These facilities have different roles:

- The Glentress facility is not graded but it can be ridden again and again to hone skills. It is used as a teaching aid for novice / children groups;
- The Kirrourtree facility consists of three graded interpreted routes, as a taster trail experience, but it is rather too hard and very limited and not as fun orientated as the Glentress model.

Strategically skill loops are good at development of the novice and education group markets. The skills loops tasters have a role to play, particularly at the novice end of the market but they must truly reflect the skills required on the trail and not discourage users.

North Shore and Trials Areas

North Shore or 'boardwalk' was traditionally used to cross boggy / wet ground in North Vancouver. However this product is now being used as a separate freeride product aimed at more extreme riders. At a low level North Shore is relatively safe and should continue to be used strategically to cross poor ground conditions therefore reducing erosion.

Local enthusiasts tend to build unofficial and illegal high level North Shore developments some of which are unsafe and will be removed or replaced by FCS staff.

High level North Shore developments are acceptable where they are gated and corralled experiences where visitors cannot stray into them inadvertently. North Shore developments should all have pre-qualifiers and varied routes of different skill aptitude (see Balnain development Glen Urquhart).

Strategically FCS must work with local enthusiasts to improve the safety and quality of North Shore experiences. The location of these products is key. They could be viewed as an extension to urban skate / BMX parks etc.

Standalone North Shore and trail developments should be limited and actively discouraged to a few key sites as maintenance, management, safety and risk assessment issues are high.

Trials areas are less of an issue as they are so extreme they will and can only be used by expert riders.

Dirt Jumping

Dirt jumping has evolved from BMX-style riding and is an extreme form of fun park on a shallow slope but with a series of large jumps. There are usually three tracks, run in parallel, with three or four jumps on each track. The tracks are of a different skill level from easy to hard. There is normally a single return track developed. This is a small facility and suitable for a confined area.

There are opportunities to introduce this facility to augment fun parks and skills loops and also perhaps, to introduce it as part of WIAT developments. They can be built cost effectively with tyre bales and larger earth moving equipment and can be maintained in association with local volunteers.

Multi-User Trails

Strategically FCS should increase the number of multi-user trails for recreation – walking, horseriding and cycling. Given the current access legislation there is a growing need for these trails. These trails are ideal for novices, families, older cyclists and tourist cycle excursionist / sightseers. Good sustainable trail systems must be created with the necessary cycling control points to control speed of descent, good sightlines, trail anchors etc. These facilities will improve visitor management and increase responsible and safe trail use.

Strategically multi-use trails are important cycle facilities and they can be linked to other products.

Other Recreational Products

At some national / regional forest facilities there may be an opportunity to augment the recreational product with other facilities to widen market appeal. Suitable activity products for consideration may include:

- Bouldering;
- Mountain board tracks;
- Aerial walkways / runways 'Go-Ape';
- Grass sledging;
- Mountain bogies;
- Disabled off-road mountain wheel chairs.

These products should be investigated with project partners and private sector as relevant.

Zoning and Other Issues

It is important that consideration is given in the future to perhaps zoning certain areas of the forest for single recreation uses ie cycling, walking, horseriding.

FCS, as responsible providers of facilities and land managers, considers that zoning may be necessary for a number of reasons:

- To prevent conflicts between users;
- To improve safety of facilities;
- To prevent neighbour nuisances / disturbance;
- To avoid environmental sensitivities / restrictions;
- To protect fragile habitats, wildlife.

Zoning would undoubtedly have to embrace the issues raised under the Outdoor Access Code.

Cross-Country Epic Products

There is an opportunity to develop a network of recommended signed loops but ungraded (see new Glentool, 7stanes route), and 'out and back' trails under a new brand utilising forest roads, strategic single tracks, National Cycle Networks etc to make it more contemporary to the marketplace. This is taking the existing forest road cycle products and re-branding / repackaging.

At this stage the Consultants have used the title Cross-Country Epics for this product. A brand needs to be created and market tested. These signed routes will provide the seal of approval for the visitor by FCS (who is seen as the leading authority in forest cycling and mountain biking development in Scotland). The brand values which have been established in the single track trail development arena would be applied to the forest road routes (see marketing and branding aim). In most instances this may just be a repackaging and repositioning of existing forest routes, but there are also opportunities with strategic links and route partnerships to devise a more imaginative product utilising Sustrans routes, local path networks etc.

Issues of ongoing inspection and maintenance, liability and signage on longer routes would have to be addressed at partnership level. In addition, consideration must be given to providing route surfaces that are suitable for cycling, or warning signs where terrain is rough and gradient steep. Where forest roads and other routes are upgraded for / after harvesting, consideration must be given to the longer-term recreational use.

All Epic routes would have wonderful views, points of interest en route, interesting terrain and landscape, natural or historic built heritage. The routes themselves would not have the technical difficulty of single track routes, as they would be ungraded trails (see communicating with the visitor). Some routes however would be long-distance so would have a physical difficulty; others would be short, aimed at children or the holiday cyclists. All Epics, regardless of route length, would have one thing in common – fantastic views, awesome terrain, marvellous environment, wonderful nature, a fantastic visitor experience. The Consultants suggest that the Cross-Country Epic product will appeal to a wider range of markets if the brand was subdivided (again this needs market tested):

- Epic Mini – flat, short routes aimed at families, children and older cyclists, short break tourists, sightseers;
- Epic Classic – routes with wonderful views, attractive to half-day, cross-country excursionists, older families, short break tourists;
- Epic Mega – long physically demanding routes over varied terrain aimed at the adventurous, physically fit, cross-country cyclist – some of these routes could be designed to incorporate an overnight stop passing through villages (Bed and Breakfast, Hotels, Campsites, and Hostels etc).

The Epic product can play a wider strategic role if directly linked to regional and national purpose-built mountain bike facilities. The Epic product will widen the market appeal of purpose-built facilities. The purpose-built facility will provide safe car parking and in some instances central facilities: refreshments, toilet and changing for the Epic rider.

This framework suggests that an objective and pragmatic view must be taken. Signed forest roads, single track National Cycle Network routes etc can all be used for cycling if the dangers and risks are clearly communicated to the users. The landowner / trail development champion must take reasonable steps to minimise and communicate the risks to the users. Whilst many of these forest routes already exist and are signed, it is the clear promotion and communication of these to the market where the issue lies.

FCS has a strategic role to play together with partners in providing these routes (long and short). These routes attract a wider market than purpose-built single track developments and can be promoted for safe cycling, particularly amongst: families, women, older people, adventurers, fitness market, short break tourists etc and provide a good transition from road cycling to purpose-built single track. This is an important and strategic recreational resource, transport network, key linkage, etc. Each forest has a strategic role to play in the provision of this product in the future. The opportunity, however, is even greater, if these and other link routes are properly marketed, packaged and branded. One just has to look at the monthly mountain bike magazines to see recommended routes and pull-out route cards. The web is also full of route recommendations as are cycle books etc, but FCS does not take responsibility for these.

Cluster Products – Creation of a Cycle Destination

In order to unlock the full economic potential of forest cycling and help to sustain the proposed network of cycling products, a cluster approach to marketing, promotion and positioning of forest cycling facilities is recommended.

It is suggested that clusters of cycle facilities should be supported by local tourism infrastructure in order to maximise destination credentials. This in turn will help to support local businesses and create new economic opportunities. It will also help to maximise the opportunity for community facilities, clustering will create greater facility critical mass, boosting destination appeal to boost average length of stay.

In promoting cycling for a short break, a visitor would be inclined to visit one or two cycle venues each day, particularly where the routes are short, few routes or no links are available, or where there are no central facilities.

The cluster products for consideration, as overnight cycle visitor venues, include the following four examples:

- Dumfries and Galloway Focus – Mabie, Ae, Dalbeattie, Kirroughtree, Glentool and Drumlanrig;
- Lochaber Focus – Leanachan, Laggan Wolftrax, Brecklett;

- Inverness Focus – Learnie Red Rock Trails, Balnain, Fochabers, 10 Glens Epics;
- Northern Focus – Golspie, Balblair, Carbisdale.

Commercial Product Opportunities

There are a limited number of revenue generating opportunities for FCS. Strategically FCS should maximise the commercial revenue and business generating opportunities at each forest site. A formal review of each site examining the revenue generating potential should be carried out.

Each site should be assessed on its own merits given the volume of usage, not only of cycling markets but other recreation users. A masterplan and feasibility study is needed for each location. This collective approach will ensure that facilities are developed to meet the needs of a wider market base, increasing facility sustainability and revenue generating opportunities (see Glentress / Kirrroughtree).

Where central facilities are proposed an assessment should be made as to whether these facilities are going to be provided and operated internally by FCS staff or externally on a commercial lease basis. It is anticipated that given the success of the forest sites with central facilities ie Laggan Wolftrax and Glentress, a more commercial level of lease could be offered in the future at these sites. New facilities may still have to have 'soft lease' periods / other incentives to attract commercial business interest to the forest. This issue needs to be considered at the planning stage with the local business community and supporting agencies to ensure that existing local business is not disadvantaged.

The Consultants believe that the policy of charging for car parking at higher user sites should be extended. The car park honesty / collection rates would be higher if visitors were informed of the use of the money collected.

Earlier 7stanes visitor research suggested visitors would give more positively if they knew the revenue collected was being channelled into trail / facility maintenance and match funded. A method of communicating to the visitors needs to be devised. The level of charge and the willingness to pay needs to be formerly tested.

If car parking charges were more widely introduced there may be an opportunity to introduce an annual membership / friends scheme – annual price charges need market testing. This could entitle the member to the following benefits:

- Free car parking key forest sites;
- Free personal accident / liability insurance whilst using the forest resource;
- Discounts off retail / bike hire / café;
- Six-monthly newsletter.

Membership category ie family and cycle club / group could also be considered.

This system needs to be fully researched as to its practicality as part of wider recreation provision. Administration cost of such a scheme could be considerable and needs to be factored into the case for a membership scheme. So far FCS has opted out of a national scheme, but there are a few schemes at Forest District level, some of which have since died out. Charges were subject to annual review by FCS.

Charging for showers and bike wash facilities are not really viewed as commercial opportunities and the revenue collected barely covers the cost of providing the service in the future.

Cycle uplift facilities tend to be provided by the private sector on the basis of a lease payable to FCS.

Epic routes and links to wider destinations give the opportunity for private businesses to operate re collect, drop, transport and organise itineraries for visitors giving linkage to accommodation and other recreational activities.

FCS could develop a range of branded speciality retail merchandise and 'bike bling' for sale throughout Scotland in appropriate forest facilities (see success of 7stanes cycle shirts), links to branding. Consideration given to retail outlet at strategic cycle facilities.

7.2.4 Action Points

The action points under **Aim / Priority 2: Improving and Developing the Product** are as follows:

Priority Area	Strategic Action
Cycle Destinations	Ensure 'destination tests' have been performed prior to future strategic product development at a regional / community level.
	At a regional level, work with public sector partners and private sector to ensure cycling is fully integrated with wider tourism destination credentials.
Strategic Positioning	FCS must strategically position each facility national / regional / community to help guide future development.
Product Development Opportunities	Prioritise from a national strategy perspective / fit re delivery of projects at a regional / community level.
	Carry out additional strategic development at Glentress and Leanachan Trails to make them truly 'world-class'.
	FCS to work with Nevis Range and EventScotland in improving the spectator experience for the World Championships 2007.
	Work with partners to develop new and improved central facilities at all national facilities – widen appeal of facilities to other recreational users.
	Build on the success of the 7stanes mountain bike product by developing a network of purpose-built, sustainable 'off-road' cycling clusters throughout Scotland – linked to tourism destinations.
	FCS to work with partners to fill the product gap for 'off-road' facilities in the West of Scotland (see Trossachs national opportunity) aimed at local residents and overnight tourists.
	FCS to work with Nevis Range, VisitScotland etc to ensure a legacy from World Championships 2007 – eg more accessible downhill routes developed. Increase the number of non-Scottish visitors for cycle holidays.
	FCS to consider developing a range of fun and skills-based mountain bike products to maximise length of stay, encourage new markets and maximise repeat visit potential – links to WIAT etc.
	FCS to encourage development of multi-user trails at strategic sites.
	FCS, together with partners and other landowners, develop a new range of 'forest cycling' products aimed at novices, families, older cyclists – cycle tourists. Signed routes of various lengths should have fantastic views etc (see Epic brand).

Priority Area	Strategic Action
Product Development Opportunities (Cont'd)	FCS to optimise / maximise commercial opportunities at each forest site. A structured site by site review of the potential is required.
	FCS to liaise closely with SDA over future development of downhill venues – permanent / temporary / events etc.
	FCS to pioneer the development of an intensive trail network approach rather than just the '3 structured loop' system.
	FCS to review national / regional internal catering / retail / information opportunities for cycling in line with wider recreation objectives.
	FCS to review / investigate / carry out survey re car parking charging, honesty / collection system for recreation as way of raising money for all walking / cycling / trail maintenance – consider opportunities for annual membership schemes.
	Develop central facilities at key regional facilities satisfying wider recreational markets and create links to local village services.
	FCS to work and lead on communication with local communities to ensure recreational support facilities are provided in the villages. This may include commercial businesses, community companies, village community facilities etc.
	FCS to investigate other forms of <u>new</u> recreational provisions in key forests ie bouldering, mountain boarding etc.

7.3 Aim / Priority 3: Communicating with the Visitor

Improve communications with the visitor in regards to information, interpretation, route grading, increasing visitor enjoyment, health and safety, and better visitor management.

- **Route Grading** - The development of a clear and understandable route grading system for purpose-built mountain bike facilities, Epic routes and other trails, etc.
- **Route and Site Interpretation and Information** - Providing a range of easily understandable information which supports the growing use of the forest by a wide number of recreation markets. Links to education and skills development.
- **Health and Safety** - Ensuring visitors understand health and safety issues and promoting responsible trail use.
- **Customer Care and Quality of the Visitor Experience** - Develop a customer care system for FCS recreation including cycling, ensure appropriate feedback and follow-ups are put in place. Ensure staff and management understand need for good customer care. Links to VisitScotland, Pride and Passion.

7.3.1 Route Grading

There is a need to develop a clear and understandable route grading system across purpose-built mountain bike single track trails in Scotland. The long-term goal should be to enable this grading system to be adopted across the National Forest Estate at a Great Britain level, ie neither England or Wales currently has a fully comprehensive grading system.

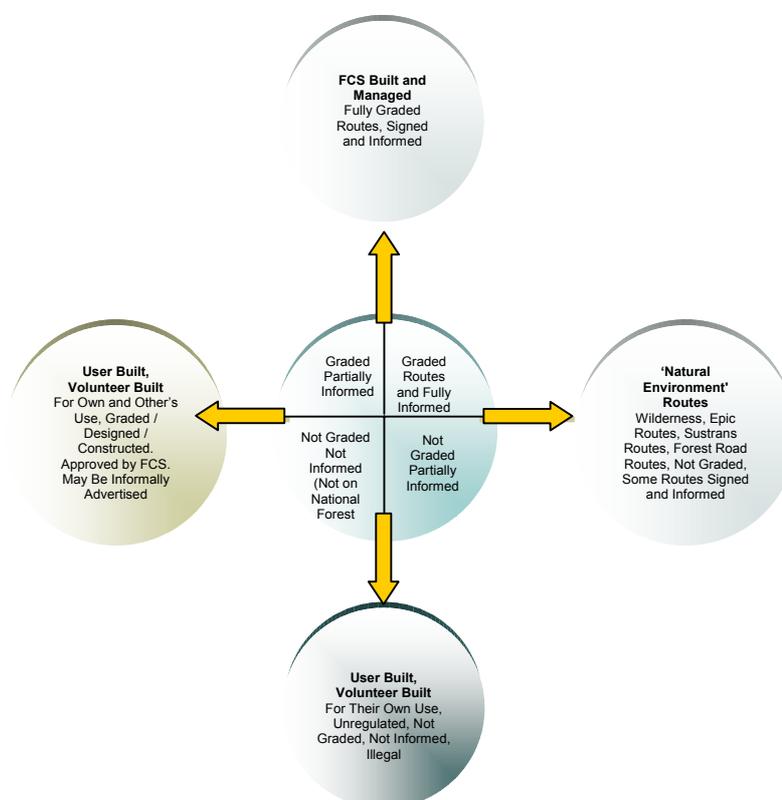
It is envisaged that FCS will write a fully comprehensive grading module to accompany this framework at a future date. This will be an early action and a high priority.

For this reason the main body of this document provides a framework to develop a grading system or in reality to build on and develop what is already in place and fast becoming an established system recognisable by the marketplace.

It has been agreed, in principle, that all purpose-built single track mountain bike developments on the National Forest Estate, built and / or managed / supervised by FCS, should be graded. It is an ambition that this grading system will be fully adopted at other sites where purpose-built facilities are constructed in the future as well as throughout the National Forest Estates in England and Wales.

Epic routes, Sustrans routes, forest roads, wilderness areas, unmanaged user build sites will not be graded but these routes will incorporate: trail directional signage, visitor information and interpretation.

Type of Routes and Trail Grading



The reason for a grading system is as follows:

- To define a standard of planning / design / construction and maintenance;
- To inform the visitor of the type of route;
- To inform the visitor of the difficulty of the route;
- To inform the visitor of the skill level required to cycle the route safely;
- To promote an enjoyable visitor experience;
- To promote cycling safety.

The grading of individual purpose-built mountain bike routes will undoubtedly be subjective and it will also depend on the weather conditions, time of day / year, etc. This must be communicated to the user. However there must be an agreed set of principles to grading in order to increase the objectivity.

It must be remembered that no route grading system is perfect. A grading system should only be used as a general guide to the visitor.

The difficulty of a trail at any given time will depend on a number of other external factors / influences:

- Weather conditions;
- Ground conditions;
- Time of day / time of year / levels of light;
- Tiredness of rider;
- Trail usage levels / erosion;
- Speed of ride.

Ideally to increase the grading consistency and quality of purpose-built trails across Scotland a single grading team should inspect routes before they are given a recognised FCS grade. Trails should also be graded under similar conditions ie dry day during the summer months. If a purpose-built route is not graded and the need for ongoing maintenance managed, it cannot be part of a recognised FCS quality product / brand. An ungraded purpose-built single track mountain bike route should not be developed on National Forest Estate land. All routes must be graded. If grading is disputed, the higher grading for the route must be adopted.

Short link sections of single track between forest roads are not deemed to be single track routes, only links to Epics, Sustrans routes etc, and therefore do not need to be graded.

At the end of each season, routes may have to be reassessed to ensure the route fully meets grading criteria.

If large-scale trail maintenance, route diversion or construction of new features occurs it must be recognised that the trail may have to be re-graded.

Before trails are formally inspected it is recommended that each trail is given an 'awaiting inspection' designation, at this stage an indication of the likely overall grade albeit unofficial should be given to the user.

The grading system, which has largely been adopted by FCS and now accepted by the user for purpose-built mountain bike trails, is based on a colour code system (not unlike skiing) from: green, blue, red to black and double black (green being the easiest).

It must be understood that this grading system applies to cross-country-style trails ie the user cycles uphill as well as downhill on a variety of surfaces across a variety of terrains.

A grading system has also been evolved for downhill tracks – see Innerleithen Red Bull Project and Forest of Ae. Downhill tracks are where riders cycle downhill only. To start a ride, they either push their bikes uphill or are assisted by an uplift facility / vehicle. At present downhill courses are graded predominantly black (there are red downhill routes at Innerleithen). In the future however, market demand may dictate that more red or blue downhill routes should be developed. This could result in potential grading confusion unless a clear system is communicated to the user.

Other products also warrant grading ie skill loops. Whilst it is recommended in the future that these should not necessary be integrated with cross-country routes they still should be graded facilities, to give the user an understanding of the skill required to enjoy and cycle these facilities safely.

The cross-country grading system is fairly prescriptive in its approach and route grading depends on a number of factors ie:

- Width of trail;
- Type / smoothness of surface;
- Steepness of climbs and descents;
- Type and style of obstacles.

A whole route must always be graded at its highest level eg if there is a short difficult section on a blue route (ie red difficulty) which cannot be avoided then the whole route must be graded as red. If the hard obstacle can be avoided with a blue trail, then the trail can be graded as blue and the individual obstacle can be graded as red ie if there is a harder obstacle, the user must 'opt in not out'. This issue may become more apparent in the future as more feature rich trail networks / routes are developed.

In both cross-county and downhill cycling, individual sections / loops can be graded harder / easier as long as a trail has an overall start to finish same grade. This makes the development of graded web networks possible. The current grading system is as follows:

TRAIL GRADE SYNOPSIS	
Trail Colour Cross-Country	Description
Green 	Easy, relatively flat and wide trail. Climbs and descents shallow. Smoother surface often 2m to 3m wide. Few obstacles. Suitable for beginner / novice cyclists and families and children. Often makes use of forest roads with other single track connections, public roads etc – could be ridden with 'hybrid' mountain bike type, child's bike or adult bike with 'tag-a-long'.
Blue 	Moderate grading. May include short, steep sections. Surface may include small obstacles, roots, steps etc, mostly 1m wide. Suitable for intermediate cyclists / mountain bikers / reasonably fit families. Front suspension mountain bike recommended could be ridden on rigid or child's mountain bike.
Red 	Difficult grading with steeper and tougher sections. Includes rougher, arduous sections to satisfy the need for technical challenges. Surface type often challenging and width below 1m with a range of surfaces including rough narrow tracks. Suitable for good mountain bikers / with good experience – front suspension bike with disc brakes recommended.
Black / Double Black 	Severe grading with steep gradient and drop-offs. Trails will be very technical with many rocky contours and grade reversals. Surface is mainly rough / rocky narrow tracks. Trail widths very narrow between 10cm and 60cm. Targets expert mountain bikers. Majority of trails will be single track – full suspension bike with disc brakes recommended.
Downhill (Red / Black)	Severe grading. A short, technical descent usually between 2km and 5km in length. Steep with drop-offs and 'mandatory air'. Targets advanced riders with specialist downhill mountain bike experience – 'large travel' full suspension bike with 5 to 6 inches of suspension recommended.

Note: Type of bike is Consultant's own recommendation based on personal experience.

7.3.2 Route and Site Interpretation and Information

It is extremely important, as part of the product / service planning process, to devise an interpretative plan for each facility / site. This should be incorporated into the wider Forest District recreation interpretative plan.

Forest cycle and mountain biking products cannot be experienced by their very nature at a distance, good visitor information delivered at the right time and place is extremely important.

Good communication with the visitor is paramount to the safety and enjoyment of the user of the forest cycling and mountain biking product. How cycling can link with the wider forest recreation resource and wider tourist destination is key to maximising the economic potential from cycling practicality to rural areas.

A range of communication issues must be addressed in order to offer a wide range of visitors, access to the best possible cycle products.

ROUTE TO INFORMATION			
Stage	At the planning stage →	On arrival at destination →	Whilst visitors are in the destination
Media	Word of mouth, website, publications, bike magazines.	Central facilities, trail head staff, publications.	Staff, publications, signs / interpretation.

It is recommended that directional / orientation and interpretation signage etc has a corporate image / fit. This will help to promote the FCS Cycling and Mountain Biking brands.

For the visitor there are three important stages in information provision:

At the Planning Stage

Mountain bike enthusiasts are very well researched; they know which routes are available and what routes they want to cycle. On the other hand the tourist market is looking for recommended venues, tourist destinations and routes.

At the planning stage information provision is as much about marketing and promotion as visitor information.

There are a number of sources at the planning stage: trade press, specialist books, VisitScotland brochures, which will be covered under the Marketing Section.

Electronic Communications

It is considered that a good website is the best form of communication at the planning stage. The 7stanes website is considered by the Consultants as being the benchmark model to copy for other regions. The 7stanes website includes the following information:

- 7stanes individual site information;
- Individual downloadable route maps;
- Route status conditions – open / closed, areas under construction / diversion;
- News and event information;
- Where to stay – links to VisitScotland;
- Getting there information;
- Skill tips;
- Videos of trail experiences;
- Gallery;
- Trail building weekend;
- Bike hire / retail;
- Bike magazines / reviews;
- Weather;
- Cycle code etc.

The Consultants consider only minor additions to the 7stanes website need to be considered in the future ie:

- Links to other forms of recreation in the forest and in the wider area;
- Links to other things to see and do – aimed at a wider market base;
- Promote forest cycling and mountain biking as part of a wider visitor target destination product;

- Promotion of the 'Epic routes' and other routes linked to mountain bike facilities, destinations needs to be incorporated;
- Improve messages re Health and Safety, emergency procedures, user responsibilities, planning escape routes, equipment and clothing (see reinforcement whilst visitors are at destination).

On Arrival at Cycle Destinations

The most important form of communication at this stage is visitor orientation to and around each forest site. FCS recreation is the master brand of which cycling is only part. Cycle products must fit with the wider visitor recreation orientation message. Each site should have the following:

- Clear direction signage off / to main road / public link transfers;
- Clear signage to car parking;
- Clear signage to trail heads / central facilities;
- Good site orientation points (see Ae Forest);
- Agreed system of uniform car parking charges across the National Forest Estate and messages promoting trail access (cycle, walking) (see maintenance, management);
- Clear links / signage for other forms of recreation, particularly where cycling interfaces.

Whilst Visitors are at the Destination

At the destination clear indication of graded routes is key. Whilst visitors are at the destination, there is also an opportunity to give the visitors wider information / interpretation. This is particularly important for novices, families and older markets. It will also encourage visitors to develop a wider interest in the forest resource and create a more holistic forest recreation experience. It will also promote extended stays and repeat visitors.

In terms of route information, supplementary information should be provided for both graded and ungraded routes ie:

- Route lengths;
- Likely time taken for route;
- Type of terrain – steepness, type of trails;

- Remoteness;
- Suggested escape route, health and safety messages;
- Network of clearly signed routes, both graded and ungraded showing physical distance / time / type of terrain;
- Availability of route maps showing clear network of graded routes and links to local accommodation / activity providers (see 7stanes);
- Route / site interpretation should include the following:
 - Skills loops, skill tips interpretation panels (see Glentress);
 - Interpretation of key landmarks in the forest;
 - Interpretation to enable users to develop wider forest interest;
 - Interpretation of forest flora / fauna;
 - Specialist interpretation for children;
 - Access to art in the forest.

Monitoring and Evaluation

Continual monitoring and evaluation of the information provided to the visitors and the media used is required to ensure it is effective, up to date, and gives the correct information re maintenance, routes, diversions etc. As part of the evaluation process, feedback from the users of the level, type and quality of information provided should be assessed on a regular basis.

7.3.3 Health and Safety

Health and Safety is a key concern for all forest recreation types, but it is a particular issue for forest cycling and mountain biking. Health and Safety policies and management practices are being discussed and devised at a Great Britain level and cycling and mountain biking on the National Forest Estate in Scotland will have to fit and comply. During the process of writing this framework document Forestry Commission Great Britain have employed a Health and Safety Executive for mountain biking to represent Scotland, England and Wales. This will help in the formation of a consistent approach and standardisation of policy across Scotland, England and Wales.

As previously discussed there are three types of trail development:

- FCS built and managed facilities;
- The National Forest Estate environment, trails and routes;

- User built trails.

As a landowner FCS has a duty of care to all recreation users of the forest.

From a Health and Safety perspective, if trails cannot be maintained in the future they should not be introduced regardless of evidence of local demand or market opportunity.

The key to good health and safety is trails that are fit for purpose, good quality and well maintained (see Product Maintenance).

Forestry Commission Great Britain will continue to refine its health and safety policies across the UK. The principles to refine health and safety policies for recreation and cycling must take account of:

- Increasing Awareness
 - Ensure visitors know the risks they face;
 - Inform people about control measures and precautions they need to take as users;
 - Recognise that different users accept different levels of risk;
 - Understand and communicate that some users create risks for others;
 - FCS has a Health and Safety advisory role, to increase professionalism and help communities, in particular to manage Health and Safety issues / risks.
- Responsibilities
 - Strike a balance between users' self-reliance and FCS management intervention;
 - Visitors must be responsible for themselves and their own actions;
 - FCS must provide clear and only key information for users to make their own qualitative judgements;
 - FCS must ensure high quality trail routes are fit for purpose;
 - Ensure that trail designers / builders, community driven projects in particular, are aware of their responsibilities and risks.

- Controlling Risk
 - Risk assessments and safety plans – reporting system must be devised for each site;
 - Risk control measures should be consistent across Forestry Commission Great Britain;
 - Visitor behaviour should be continually monitored and safety plans updated.

Information is Key

Good visitor information is key to the management of risk and improvement to health and safety, without taking away the visitors' sense of freedom and adventure. FCS needs to strive to achieve this efficiently and cost effectively.

Each of the three trail development types outlined previously have various levels of risk to different users. There are also risks to FCS, the community, trail designers etc.

The most risky development is an unmanaged informal trail network developed by local users, where inexperienced riders could inadvertently stray onto – FCS must work with local community and user groups to help advise and manage health and safety and control risk.

The purpose-built mountain bike facility for the experienced rider ie a black route is probably the least risky. The degree of risk for inexperienced ill-informed riders at purpose-built facilities is where the risk is greatest.

The introduction of the following information tool will help improve Health and Safety and manage FCS risk.

INFORMATION TOOLS	
Tool	Message
Consistent Route Grading System	This is a key information tool for visitors to make value judgements.
Ungraded Route Information	Length, type of terrain, time, type of bike, user suitability etc for visitors to make value judgements.
Safety Equipment Messages	Wearing helmet, take extra clothes, take a waterproof, bike repair kit, essential supplies.
Escape Routes	Advise users on purpose-built trails and other routes of potential escape routes – safety vehicle access points.
Emergency Procedure	Advise users of emergency procedures, their and FCS' roles – emergency services contacts etc.
Reporting Systems	Ensure FCS has good record keeping systems of regular maintenance, trail checking, accidents, trail improvements etc. Encourage proactive accident reporting procedure / systems.
Route Maintenance Erosion Issues	Encourage users to report route maintenance issues.

FCS must ensure that information is kept up-to-date, particularly information regarding route closures / harvesting etc. A good recordkeeping process is absolutely necessary at each forest site and a system must be devised at a national level.

7.3.4 Customer Care and Quality of the Visitor Experience

It does not matter how good the trails are, if FCS staff working 'front of house' in the customer arena provide anything less than a warm welcome and a professional service, it could ruin even the best visitor experience.

However, the FCS aim is to ensure that FCS staff and management, whether 'front of house' or not, have the correct skills to give visitors to the forests a warm welcome and an enjoyable and interesting stay, to add to every visitor experience.

The Scottish tourism industry wants Scotland to have great service and they have kick-started a movement that will take Scotland forward to deliver outstanding levels of service 'the envy of the World'.

'It ain't what you do it's the way that you do it'.

This is the Pride and Passion Movement for Scotland. FCS will sign up to the Pride and Passion Movement – to help promote and improve customer care.

- Our visitors will feel welcomed and valued;
- Our visitors will meet friendly, happy, helpful staff;
- Our visitors will recommend to other new visitors to visit;
- Our visitors will come back again and again.

Pride and Passion will use peer pressure.

The tourism industry in Scotland in the 1990s developed Welcome Host and Welcome Back aimed at improving customer care skills of staff in the tourism industry.

A totally new programme is being devised, aimed at tourism business owners and managers who value their staff. This will improve the employee experience which will have a positive impact on the visitor.

The '100K Welcomes' (currently being piloted) is a single course currently being developed by the Enterprise Network. In addition to core customer care / service skills, it will also look at productivity and competitiveness.

FCS needs to continually exceed customer expectations – “we need to know who the customers are and what they expect of us”, but FCS needs to stay ahead of the game as customer expectations change. FCS must keep on top of market trends and new developments, and be able to respond with product and service development enhancements. This will ensure existing visitors return and new visitors are attracted.

Mountain bike and recreation rangers at key strategic forest sites must have an emphasis on customer care. However, how to meet the future cost of this provision needs to be considered. It is recommended that FCS not only undertakes customer care training for management and staff, but also devises / designs a customer care system which collects, monitors and evaluates customer feedback, provides follow-up action, and which is then used continually to upgrade the forest cycling and mountain biking product and promote staff development policy.

It is important that there are the correct range of skills and training opportunities to match what the businesses need. At a national level the Skills Council, People 1st are devising a skills passport which will enable staff to record their skills and qualifications – from 2010 it is likely that the public sector agencies will only work with businesses participating in the scheme. It is recommended that FCS and lessees participate in the future scheme.

The quality of the visitor experience needs to ‘surprise and delight’ the visitor – A Framework for Tourism Change (Consultation Draft, November 2005) states that: *every tourism and related business will be strongly encouraged to become part of VisitScotland’s QA Scheme.*

Increasingly the public sector agencies will only work with businesses in other sectors who participate in the appropriate Quality Assurance (QA) Scheme.

The present QA Scheme covers food outlets / cafés and restaurants. FCS should aim for central facilities to be graded in the future by VisitScotland.

The activities provision is not yet graded under a QA Scheme, but because activities are a key thrust of future tourism strategies, it is likely that a scheme will evolve.

FCS should work together with VisitScotland / Active Scotland and partners to help devise such a QA Scheme.

It is recommended that key mountain bike facilities and sites should participate in VisitScotland’s Green Tourism Business Scheme. This scheme was launched five years ago to encourage tourism businesses to be environmentally-friendly. This scheme promotes to the visitor environmental good practice and sustainability of participating businesses and organisations. FCS should promote this scheme as an integral part of the mountain bike product design, management and operation.

The Green Flag Award is a national environmental scheme for parks and green spaces in England and Wales. There are plans to extend the scheme to Scotland. Whilst this scheme does not cover forests specifically, it does cover woodlands. FCS, with partners, should help pilot such a scheme in Scotland as it sets high environmental standards, creating a benchmark of excellence in recreational green areas.

7.3.5 Action Points

The action points under **Aim / Priority 3: Communicating with the Visitor** are as follows:

Priority Area	Strategic Action
Route Grading	FCS to develop a fully comprehensive trail grading system for purpose-built single track facilities. Detailed policy manual to be written as guidance for trail designers / FCS regions / communities / volunteers.
	Agree that some products should not be graded ie fun parks and Epic routes, but visitors must still be informed (see information).
	Agree with partners / FCS route inspection system. Awarding of grading – routes must meet design criteria, and quality / maintenance standards must be addressed.
Route and Site Interpretation and Information	FCS, together with the appropriate partners, should prepare a visitor site information and interpretation strategy for all forms of recreation, including cycling.
	FCS to devise and agree suite of information requirements and 'corporate' format for ungraded forest cycle routes / Epics etc.
	Devise FCS forest cycling and mountain biking website and link and develop regional websites (see branding).
Health and Safety	FCS to continue to discuss and devise health and safety recreational policies including forest cycling and mountain biking in line with Great Britain level to enable consistent approach.
	Risk should be controlled and safety plans and risk assessments must be prepared for each site.
	Ensure that information tools are put in place for each forest site ie emergency procedure, accident reporting, escape routes etc.
Customer Care and Quality of the Visitor Experience	FCS to devise / design a customer care system.
	FCS consider extending provision of mountain bike and recreation rangers at key sites – role to include customer care, trail maintenance, health and safety etc.
	FCS to sign up as a 'friend' of 'Pride and Passion' Movement.
	FCS to evaluate the relevance of the new 100K Welcomes programme for recreation management / staff.
	FCS and lessees to participate in future VisitScotland QA and Green Tourism Schemes.
	FCS and lessees to promote skills passport system.

7.4 Aim / Priority 4: Improving Product Sustainability

Ensure that the cycling product, as part of wider forest recreation resource, is sustainable for the future. Improving maintenance, management policies and practices – promoting good design, ensuring markets continue to visit.

- **Setting and Maintaining Standards** - Setting a high quality trail standard, promoting best practice. A more sustainable and holistic approach to integrated trails development and planning for wider recreation use.
- **Trail Maintenance and Management** - Ensure trails are well maintained and managed.
- **Demand and Trail Sustainability and Ongoing Benefits** - Developing a trail system which is more sustainable yet at the same time promotes repeat visits and increased length of stay, boosting economic benefit.

7.4.1 Setting and Maintaining Standards

It is extremely important to set consistently high standards of trail design throughout Scotland to meet the growing expectations of the user.

A uniform approach needs to be devised for planning, ensuring high quality products are developed, particularly useful as different trail designers are used, even as national standards are being set.

Consistently high standards will also ensure that the guiding principle of Health and Safety is considered as an integral part of the planning stage rather than after the product has been built.

Planning consent is now required on the National Forest Estate given the removal of Crown Exemption. Therefore there is a need for notice of the proposed development.

The planning authorities will probably consider conflicts such as environmental sensitivities, other uses etc. It is recommended that by 2007 FCS will prepare a framework document setting out good practice in mountain bike trail development.

The need for planning permission now makes informal trail development illegal. FCS will work strategically with communities and volunteers to agree trail designs, layouts etc.

Strategically FCS needs to develop a better controlled and more comprehensive system for trail development. The macro, as well as the micro, trail design issues must be considered and a planning procedure developed. To date the concentration has been on the micro design issues of mountain bike trails. Macro issues must be considered in the future to help set and maintain standards which include:

1. It is recommended that the planning of a trail system in the future is more holistic and wider linkages to other users / multi-users' wider recreation needs are considered.
2. At the planning stage it is very important that FCS involves other stakeholders including the local community and local businesses in the design impact and potential use of the trails.
3. An assessment must be made as to the level and type of market demand – the market segmentation and user volumes of community, day visitors and tourist markets.
4. The planning process should include an assessment of possible community involvement promoting social inclusion, health and education opportunities and initiatives.
5. An assessment of how the forest cycle network links in with wider recreation needs and the tourist destination credentials must be made. The opportunity for development, funding and ongoing management partnership should be identified. A statement outlining the wider benefits, economic, social, health should be prepared.
6. Consideration must be given at an early stage as to the most appropriate trail designer, method of procurement, and if there is a need for professional engineering support for safety reasons, longevity issues, technical concerns etc.

7. Ideally a trail system should be planned in its entirety at a macro level rather than in ad hoc parts, even if the development is to be phased. The development, phasing and timing should be considered.
8. A statement outlining the environmental suitability and sustainability of the site and, where appropriate, individual trails should be prepared. Any conflicts should be highlighted. The statement should demonstrate measures to minimise environmental impacts of the trail development. The statement should also take account of sites of special scientific interest / flora / fauna / archaeological / national nature reserves / geological and other relevant issues.
9. National Forest Estate land is becoming increasingly popular for challenging recreational pursuits. However as these areas become increasingly popular, so concerns about the likelihood of accidents occurring have heightened. Instances of severe / fatal accidents occurring on the National Forest Estate have been recorded. It is for local FCS managers to follow Forestry Commission Guidance for Managers Framework to help support management decisions and mitigate problems. Following Forestry Commission Guidance will ensure best practice when making management decisions re cycle developments in challenging areas. This Guidance Framework was developed in 2002 and this should be augmented and updated at an FCS level in line with new thinking / developments and markets.
10. An assessment should be made at an early stage as to whether the terrain, geology and soil type is suitable for the product requirements to meet market needs etc. The quality of construction may be compromised by poor ground conditions ie drainage, which may increase both construction and ongoing maintenance costs (see Hamsterley Skills area).
11. Good trail design is key. Prescriptive plans down to micro level should be drawn for each section in detail describing technical trail design features, surfaces, gradients etc.
12. Trail corridors should be identified and surveyed in detail for soil condition, ground slope, mineral content etc.

13. A detailed statement of the ongoing maintenance liability likely for each trail section should be prepared and costed.
14. Continual checks and balances need to be put in place by the designer in the construction process to ensure trails are built to the correct specification for the correct market level and to the correct safety specification.
15. A visitor communication interpretation plan covering markets and visitor information interpretation should be considered for each site.
16. A statement on how the trail network should be managed in the future giving due cognisance to volumes of use, linkages, visitor pressures, maintenance and product / market evolution must be prepared.
17. A risk assessment of the site must be prepared.

The existing professional cycle trail designers are extremely good at considering the micro issues outlined above and there are many examples of 'world-class' cycle trail design emerging throughout Scotland. The Consultants believe that the natural design approach linked to a macro and micro planning process is the key to providing a sustainable trail network for a multitude of users at different skills level throughout Scotland.

A high level of 'thrill-style' features can be added to individual trails, if appropriate, to the market / skill level of user demand as long as the implications of longer-term sustainability management and maintenance are properly addressed. The micro planning process should be able to determine ongoing trail liabilities maintenance costs / issues section by section.

It is proposed in the future that the trail development process will be better controlled by a forest cycling and mountain biking development manager employed at a Scottish level. At the time of writing this framework document this position was being considered re part-funded by FCS and the 7stanes project team.

It is suggested that the role of this individual covers the following:

- Preparation of trail development guidelines;
- Control of route development quality / consistency / setting standards;
- Liaise with trail designers, engineering solution providers;
- Grading guidelines and inspection;
- Project support / adviser for Forest Districts;
- Represent FCS at specialist industry forums / conferences / events;
- Liaise on marketing / branding and health and safety issues.

7.4.2 Trail Maintenance and Management

No trail system, even with good design and planning, is 100% sustainable; each trail needs regular management and maintenance. Discussions with Scotland's trail designers and the 7stanes management team have revealed trail maintenance costs per annum are on average between £0.50 and £0.60 per metre for purpose-built single tracks. This usually equates to about £0.25 to £0.30 over the whole length of the trail (on average 50% of the trail / length being single track) – assuming however there are no maintenance costs on forest roads or other link sections. However, the average trail maintenance cost is based on only limited 7stanes data, with many of the facilities only open for a year or so. Over time, a more robust analysis of maintenance costs should become clear. Highly designed 'thrill sections' are likely to cost more to maintain than this average – ie fun parks, north shore, dirt jumps. FCS at the trail design and planning stage must understand, identify and quantify this ongoing liability. Based on the maintenance cost information currently available an analysis of likely single track trail maintenance cost has been included as Appendix XII.

The Consultants believe it is extremely important at the trail planning / design stage to identify the sections of trail which may require heavier maintenance and those areas which would benefit from regular inspection for safety / risks etc.

It is also important that a regular trail assessment is carried out by appropriate staff. In a national purpose-built mountain bike facility, it may be possible to appoint a dedicated cycle ranger (see Glentress). As part of the job description they would have a role to assess trails as being fit for purpose on a regular basis carrying out minor, and instigating major, trail maintenance repairs. This will help FCS manage risk and meet ongoing liabilities.

In most community facilities and other forest areas, cycling will come under the remit of a wider forest recreation ranger. It is important that the recreation ranger is given the relevant skills to deal with forest cycling and mountain biking issues including trail maintenance. Advice and support would be given by the National Forest Cycling development manager.

It is suggested that a formal maintenance system is put in place with trail assessments and repair sheets – trail / route checks must be undertaken on a regular basis. These should outline:

- Location of problem;
- Type of problem;
- Priority and timescale;
- Need to inform users – close / divert trails;
- Type of repair, equipment requirement and cost estimate.

It is extremely important that maintenance issues are clearly communicated to the public, where they have a direct impact on the cycling experience. In severe cases, trails may have to be closed, diversions instigated or new sections of trail constructed. It is the Consultants' view that the same communications system should apply to warn the public of timber harvesting operations, etc.

Trail management would also involve a considerable amount of customer care / communication particularly at the larger facilities where a dedicated resource can be employed. The ranger would provide a customer interface for FCS and provide liaison with schools, youth groups, activity providers, etc. There is also the opportunity at a national facility for a ranger to provide guided rides, organise skills sessions and local events etc.

Under the current funding regime in Scotland, it has been significantly easier to raise money for capital funding rather than ongoing revenue funding to meet operating costs.

This, together with the issue that FCS do not directly receive admission revenue from trail users, has meant that there is a growing need to over-design certain sections of purpose-built trails ie make them 'bomb' proof so the ongoing maintenance cost is reduced (the trail lasts longer). 'Bomb' proofing trails in most instances means using rock armouring to reduce trail erosion by users.

Bigger bikes, however, has meant more trail erosion and as a result even more rock armouring is required. This has had the effect of increasing the capital cost but hopefully reducing the overall cost of maintenance. This approach has merit for the more extreme routes but is not so appropriate for routes aimed at novice / family end of the market.

This approach also has a real impact on choosing the correct trail corridor as a mistake could be costly and therefore not easy to rectify at a later date. Good, well planned trail design at the outset has implications for ongoing maintenance.

Strategically FCS should attempt to get a monetary contribution from recreation users for trail usage, but to date this has proved difficult. At the high user sites car parking charging has been moderately successful in raising some revenue.

7.4.3 Demand and Trail Sustainability and Ongoing Benefits

It is important that the emphasis on forest cycling, mountain biking and its product development results in demand sustainability. The Forest Cycling and Mountain Biking National Strategy must encourage repeat visits and extended lengths of stay.

There are a number of techniques which can help achieve this:

- A web approach to trail development with short loops off main track or 'opt in' technical features rather than the recognised three stacked loop system will promote repeat visits and prolong length of stay. This development approach will also help with trail maintenance, sustainability and visitor management;
- There will be a need for ongoing route development and trail feature enrichment particularly to encourage repeat visits by 'trail bagger' enthusiasts. Promoting new features on a trail, such as a series of jumps, rock drops etc will achieve this effect;
- Linking forest cycling and mountain biking to the wider forest recreation and destination offer, will increase the length of stay and boost the number of repeat recreation visits to a forest;
- The promotion and marketing of a range of various products, such as night-riding, adventure cycling, ladies days, family fun etc (see marketing) will help to encourage repeat visits;
- The use of the forest venue by cycle clubs and the promotion of children's and family facilities;
- The advantage is that the changing seasons change the cycling experience and this can be promoted to various market segments increasing repeat visits.

7.4.4 Action Points

The action points under **Aim / Priority 4: Improving Product Sustainability** are as follows:

Priority Area	Strategic Action
Setting and Maintaining Standards	FCS to set consistently high standards of trail design throughout Scotland to meet the growing expectations of the user.
	FCS to prepare a framework document setting out good practice in mountain biking.
	FCS to develop a better controlled and more comprehensive and holistic system re manual for new trail development and planning to ensure trails are developed to the correct grading and standard to satisfy target markets.
	FCS national forest cycling development manager to support and advise on trail planning process at a community / regional level.
Trail Maintenance and Management	FCS to ensure that ongoing maintenance costs on individual sections of trail are identified at planning stage.
	Train recreation ranger staff in trail assessment and maintenance requirements – set up system of trail checking.
	FCS, together with partners, to investigate innovative methods of raising monies for ongoing maintenance – see local initiatives, use of volunteers, links to community companies etc. Opportunities to maximise visitor revenue should be identified at each forest site.
	Maximise commercial / fundraising opportunities to contribute to ongoing operational costs.
Demand and Trail Sustainability and Ongoing Benefits	FCS to develop products and techniques to encourage repeat visits by various target markets.

7.5 Aim / Priority 5: Marketing

Positively promote and maximise the use of the National Forest Estate as a key cycling and wider recreational resource for Scotland and its communities.

- **Branding and Sub-Branding** - A brand must reflect the core values, regional strengths and positive images of forest cycling and mountain biking.
- **Marketing Framework** - Successful marketing must be integrated with the market segmentation structure, offering increased focus and product fit. A partnership approach to marketing will maximise return on investment, reduce duplication of effort and ensure critical mass.
- **Raising Profile with Events** - A community, regional and national series of events will be recognised. They should be aimed at different target markets which will help to raise the profile of forest cycling and mountain biking.

7.5.1 Branding and Sub-Branding

In order to effectively market cycling and mountain biking on the National Forest Estate there needs to be a clear hierarchy of brands established. Brands need to be suggested, tested and marketed.

Role of Brands

- Brands differentiate between similar products;
- A name is not a brand until: the market is aware of it, understands what it is and where it sits amongst other products and is the 'first choice' for some of the target market;
- A successful brand has the widest target market;
- A brand conveys the key attributes of the product, it is about communicating the identity, values, image and culture of the product;

- Creating a brand is about consistency of product matching core brand values;
- Brands can be mass market or niche but they must be focused on particular target markets;
- Names can be created in an instant, brands take considerable time to create;
- Customers understand the brand when they know what they are getting.

Defining the Brands

There are three key aspects to consider in branding:

- What is the brand – from perspective users, potential users, other site users (emotions, values, benefits);
- Where does the brand fit in the marketplace;
- What will the brand name be and how will it be expressed.

In order to define the brand formal research will have to be carried out amongst existing and potential users.

Creating the Brands

Once the brand has been defined it will have to be created. It will not be a brand until the target market is aware of it. Once the brands have been defined there needs to be an Implementation Plan to build the brands and a costed plan of action will have to be developed.

FCS is the master brand. It is suggested that four sub-brands should be created under forest cycling and mountain biking. For example:

- 7stanes, Southern Scotland;
- ??, Central Scotland;
- ??, Northern Scotland;
- Epics – ungraded routes with fantastic views.

7stanes Sub-Brand

The 7stanes is fast becoming an established sub-brand for single track mountain biking in Southern Scotland. However this has a rather narrow target market base and it is geographically specific. The sub-brand also only really encompasses one form of cycling but FCS offers wider opportunities. The Glentool 'Epic' route has confused the user being marketed under the 7stanes sub-brand.

The differences must be appreciated and understood when promoting and positioning each brand.

The 7stanes sub-brand has the following set of physical benefits, functional benefits and core values:

7STANES SUB-BRAND		
Physical Benefits	Emotional Benefits	Core Values
Health / Fitness	Success	Health, Fitness and Wellbeing
Entertainment	Feel Good	Quality – The Best
Challenge	Achievement / Rewarding	Natural
Adrenaline	Thrill	Safety
Energetic	See and Be Seen – Trendy	Accessible

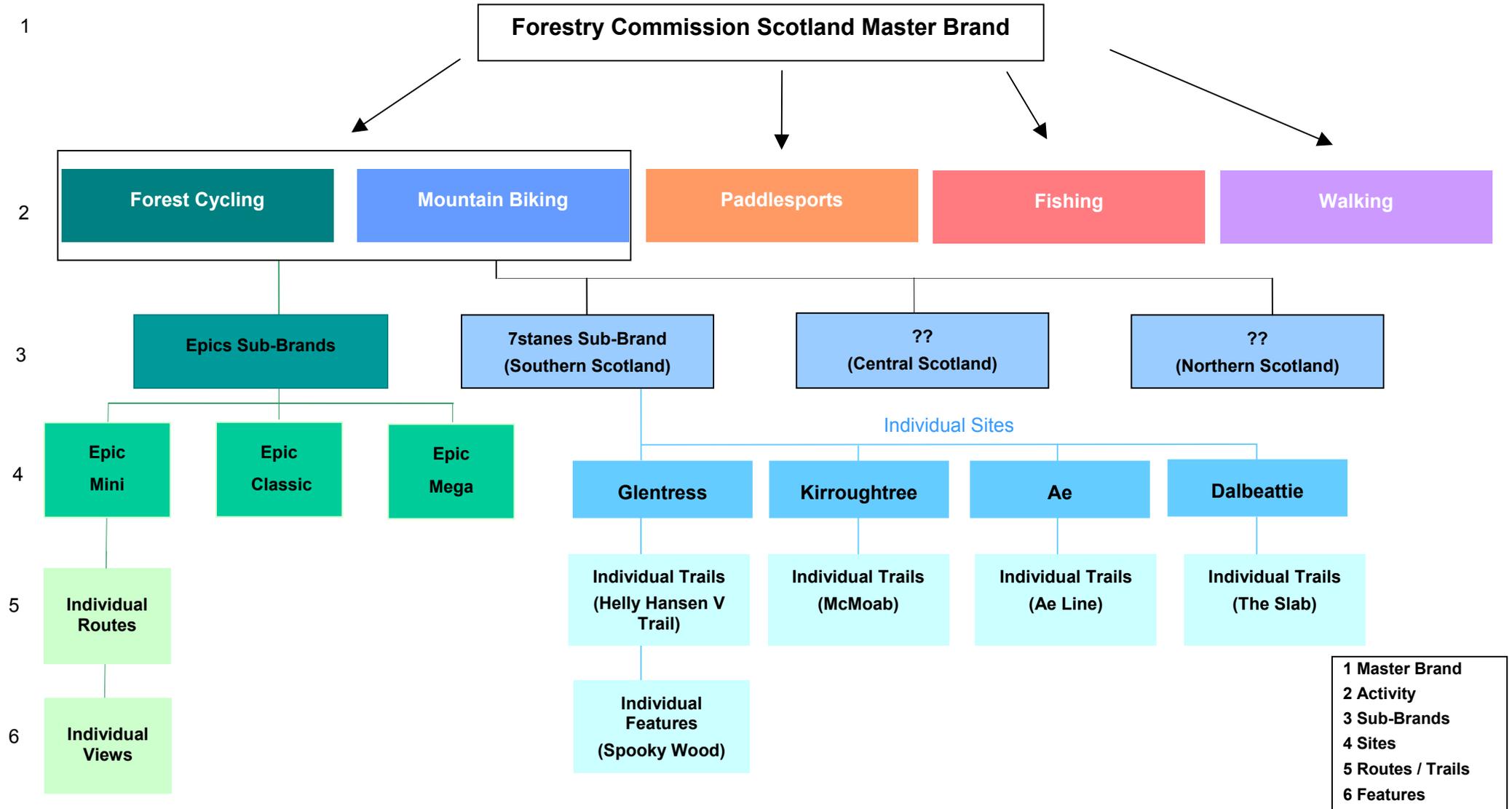
The forest cycling product, the Epic sub-brand, would have a different set of physical and emotional benefits:

EPIC SUB-BRAND		
Physical Benefits	Emotional Benefits	Core Values
Relaxation and Health	Wilderness	Health, Fitness and Wellbeing
Sightseeing and Viewing	Traditional	Quality – The Best
Peace and Quite	At One With Nature	Natural
Explorer	Space / Freedom	Safety
Challenge	Adventure	Accessible

Framework for Branding

A new brand hierarchy needs to be created and linked to wider partnership aspirations. This can only be established through user and partnership testing. A framework for branding is seen as over:

FRAMEWORK FOR BRANDING



The split of the market into Forest Cycling and mountain biking is key to attracting a wider market base. The Epic product will appeal to a wider forest cycling market than perhaps the mountain bike brands. This product split also fits well with VisitScotland's current mountain biking and cycling products.

7.5.2 Marketing

In line with this framework document, FCS together with VisitScotland should develop a fully costed marketing plan.

This marketing plan however must fit with wider forest recreation aspirations and other FCS strategies.

The market for cycling has been segmented into different user groups and each of these user groups could either be a day or overnight visitor, local resident or tourists.

MARKET SEGMENTS				
Novice Casual	Family	School	Groups	Enthusiasts
Cross-Country	Sprint	Downhill	Trials	Freeride

A purpose-built mountain bike facility could attract all these target markets but forest cycling, the 'Epic' sub-brand, would not attract downhill / freeride or trials market.

The emotional benefits of the two types of cycling are very different and these must be reflected in the marketing messages.

The marketing effort must be tailored to attract the key target markets:

- Existing enthusiast markets must be targeted to visit the National Forest Estate more often and spend more money in the local economy.
- It is envisaged that the main market growth will cater for the following target markets (introducing new markets to cycling):
 - Novices;
 - Families;
 - Women;
 - Older cyclists;
 - Schools / groups / outdoor enthusiasts.

Marketing and promotion together with product development must reflect these target markets. Wider destinations and links to other forms of recreation will be extremely important in meeting the expectations and aspirations of these markets. In addition, it is important to grow the number of overnight cycling tourists for short breaks. To meet this goal cycling will have to be integrated into the marketing of wider destinations and other forms of entertainment.

It is suggested that a comprehensive marketing strategy and action plan with the appropriate budget is devised for the next five years.

It is suggested that this plan is put together by FCS in association with VisitScotland and other potential partners. In the short term marketing to achieve brand awareness of the master brand forest cycling and mountain biking will be important together with the four sub-brands:

- Epic
- 7stanes
- A Central Scotland sub-brand
- A Northern Scotland sub-brand

This document does not attempt to devise a marketing strategy but puts forward a marketing framework.

MARKETING FRAMEWORK		
Marketing Media	Key Target Markets	Framework Notes
Word of Mouth	Enthusiasts / Families	Very important tool particularly amongst enthusiast 'trail baggers' – encourage personal recommendations, accolades.
Websites	Enthusiasts, Overnight and Day Visitors	Website must be created for forest cycling and mountain biking (master brand). This must be linked to augment 7stanes website and websites for other mountain bike sub-brands (Central Scotland / Northern Scotland). An Epic routes brand website linked to master site needs to be created.
VisitScotland National	Overnight Tourists	Promote forest cycling and mountain biking through additions to existing VisitScotland specialist cycle products aimed at overnight visitors and visitors from outside Scotland. Epic brands have a role to play in both VisitScotland products.
VisitScotland Area Network	Overnight Tourists	Ensure forest cycling and mountain biking is included in VisitScotland destination marketing with good links to accommodation, order forms of entertainment / activities etc.
Specialist Trade Press	Enthusiasts	Continue to build on the success of the 7stanes by nurturing specialist cycle magazines to write articles on forest cycling and mountain biking routes creating positive PR and personal recommendation.

MARKETING FRAMEWORK (Cont'd)		
Marketing Media	Key Target Markets	Framework Notes
National Press	Older Visitors	Encourage National Press at weekends and in supplements to feature forest cycling and mountain biking routes.
Local Bike Shops	General / Enthusiasts	Distribution of individual brochures to individual bike shops may be too expensive however, produce posters for distribution. Give information re website for route downloading, etc.
Brochures	All Trail Users	Produce family of brochures for each brand (see 7stanes) encourage downloading of routes. Opportunity to sell laminated brochures for reuse.
Merchandising	General / Enthusiasts	Consider a range of bike-related merchandise for sale to promote the brands – shirts, socks, water bottles, chains stay guards, etc.
Links to Accommodation	Tourist Visitors	Encourage local accommodation to advertise on trail guide brochure (see 7stanes). Helps to cover production cost but sells wider destinations.
Guidebook	Enthusiasts	Together with partners develop Scottish-wide Epic brand guidebook (see VisitScotland products perhaps augment Cycling Scotland brochure).
Coffee Table Book	Women; Older Cyclists; Tourist Visitors	Produce high quality coffee table book to promote the Epic brands with quality photographs of views, features (see Colin Baxter et al).
Activity Providers / Tour operators	Outdoor Activities Providers; Older Cyclists	Encourage activity providers and tour operators to feature routes and trails as part of visitor itineraries (see Saga Tours health outdoor breaks – introduce gentle cycling).
Schools and Youth Groups	Schools / Youths	Produce schools, education packs promoting features on trails cycling in forest, links to skills, etc.
Sponsorship	Cycle-Related Companies	Continue to encourage equipment manufacturers etc to sponsor trail development / and maintenance, devise other methods of raising sponsorship monies (see raising profile of forests).
Supermarket Free Magazines	Women / Older Cyclists	Promote cycling advertorial features in free supplement magazine to complement health eating.
Events	Various	See raising profile with events.

7.5.3 Raising Profile with Events

FCS should work with partners to devise an effective events programme at a national, regional and community level. Most events will be participant orientated rather than spectator events.

Events are a good way to maximise awareness of forest cycling and mountain biking increasing the brand credentials. They also create economic spin-off for rural areas, local businesses and communities.

International

International events are promoted through EventScotland and FCS has been involved in securing the Mountain Biking World Cup Series over a number of years and the World Championship 2007.

The World Cup Series events at Nevis Range in 2005 attracted some 20,000 visitors over the weekend event and are the premier mountain bike events in the Scottish Calendar.

Leanachan Forest is viewed as the International Event Facility for mountain biking events in Scotland and this position should be strategically strengthened in future with the appropriate product development to make it truly world-class.

Other international events such as, The Wilderness Arc – The British Adventure Racing have taken place in Lochaber area.

It is recommended that FCS together with EventScotland seek to attract another International cycling event to Scotland's forests post-2007. It is important that a good legacy is left after the World Championships. It is important that the World Championship event in 2007 is linked to the regional pre and post-events programme in that year. There is an opportunity that FCS could support and the National Forest Estate be the venue for cross-country mountain biking as part of the Glasgow Commonwealth Games bid for 2014.

National and Regional Events

There is a plethora of national and regional cycling and mountain biking events around Scotland and as a result they cannot all be listed here.

The SDA and the SXC each operate annual events.

The SDA run a race events series from May to September each year throughout Scotland each with about 300 entrants to each race. The events are so popular that they are now turning about 50 participants away for each event. Each event also attracts about 200 spectators and support crew. The event lasts a whole weekend, a qualifier on the Saturday and two timed runs on the Sunday. There is also a British Downhill Mountain Bike Points Series with rounds held in Scotland.

The SDA are concerned that formal downhill tracks are not suitable for elite events – they are too ‘dumbed down’. A network of informal tracks is utilised across Scotland and uplift facilities are provided on event days. The SDA feel that this informal approach is the best and want it to remain in the future.

The SXC run a series of seven races throughout Scotland. In 2005 four of the races were held on FCS land. The SXC in 2005 offered a schools races series aimed at both primary and secondary schools.

It is recommended FCS consider sponsoring the primary and secondary schools market to help grow the sport from grassroots level.

‘10 under the Ben’ was a very successful endurance race around the Witch’s Trails. This was a team and a solo event. The second event will be held in June 2006. FCS Lochaber put together a team for the 2005 event. In future it is recommended that these events can be used to promote the FCS brands.

A new event, 24/7 is proposed to help market and position the 7stanes brand – this event is an endurance challenge to cycle each of the 7stanes sites in a day – again these types of event should be encouraged to support forest cycling brands.

Community Events

There are a large number of community events – cross-country, downhill, endurance, time trials, triathlon, biathlon, charity, held at a community level throughout Scotland. These are organised by clubs, charities, local bike shops etc.

FCS must not underestimate the popularity and importance of these community events in attracting overall demand for the sport.

FCS needs to carry out a structured review together with partners at cycling and mountain biking events and their contribution and benefit in growing the forest markets. The link between events and increasing awareness of FCS cycling brands is very important. Consideration needs to be given to holding a series of fun events to promote the Forest Cycling Epic brand rather than just the mountain biking brands.

An events series could be offered in each of the main FCS sub-areas to help promote the overall FCS cycling effort.

7.5.4 Action Points

The action points under **Aim / Priority 5: Marketing** are as follows:

Priority Area	Strategic Action
Branding and Sub-Branding	FCS, together with partners, to create and test Epic brand and appropriate sub-brands.
	FCS to establish, create and test mountain bike brands for Northern and Central Scotland.
Marketing Framework	FCS to develop marketing strategy and action plan for forest cycling and mountain biking which fits with wider forest recreational aspirations and other FCS strategies.
	FCS to work with Lochaber Outdoor Capital to promote Witch's, Laggan Wolfrax and eventually Brecklett as link / cluster facilities.
Raising Profile with Events	FCS, together with EventScotland, to seek to attract more international cycling events to Scotland post-2007.
	FCS to work with partners to devise an effective events programme at a national, regional and community level.
	FCS to liaise closely with SDA and SXC re future events needs.
	FCS to consider sponsorship of Scottish primary and secondary school events series.
	FCS to devise an events series to promote mountain bike sub-brands.
	FCS to hold, with sponsors, a series of forest events to promote 'Epics' – forest cycling brand products.

7.6 Aim / Priority 6: Monitoring and Review

Improve the measurement and the monitoring of the forest cycling and mountain biking developments and their contribution to the Scottish economy and ability to improve health and wellbeing.

- **Monitoring Indicators** - A combination of quantitative and qualitative indicators would offer a basis for measuring the success each forest area is able to achieve in fulfilling the vision and the Strategy.
- **Visitor Attitudinal Research** - Well targeted research can help to aid and guide product development evolution.
- **Performance Indicators** - These should be formulated by FCS through discussion and incorporated into the final Strategy document. The indicators will provide the yardsticks to help monitor the success of the FCS Strategy.

7.6.1 Monitoring Indicators and Visitor Attitudinal Research

There needs to be a system of monitoring and review put in place. At present even the most basic of information is not available for management use. It has been suggested as part of the 7stanes Phase II developments that trail counters are installed. These should be introduced as a minimum at each key site. These trail counters should be analysed monthly and on a year-on-year basis giving an indication of visitor numbers.

It is suggested that a series of visitor surveys is carried out over the next six months at cycling / mountain biking sites and potential cycling destinations. This should be to monitor the success of existing developments but also guide future developments. Visitor sites for inclusion should include:

- Glentress;
- Kirroughtree;
- Laggan Wolftrax;
- David Marshall Lodge / Queen Elizabeth Forest Park;
- Nevis Range / Witch's Trails / Leanachan;
- Crinan.

Key information to be collated should include:

- Visitor origin, demographic data, party size and composition;
- Time of year, length of stay, length of time cycling;
- Average party spend – food, accommodation, cycling retail, recreational, entertainment, etc;
- Type of cycling undertaken and other recreation used.

It is suggested that this research is repeated at the same key sites every two years over the life of the Forest Cycling and Mountain Biking National Strategy.

To complement this consumer research it is also suggested that research is carried out amongst local businesses to monitor any economic spin-off – cohesion / linkages etc to test destination credentials.

Once the first phase of development has been completed at key sites it is suggested that formal visitor attitudinal research should be carried out to help guide future development.

7.6.2 Performance Indicators

These will be formulated by FCS through discussion and incorporated into the final Strategy document. The indicators will provide the yardsticks to help monitor the success of the Strategy.

7.6.3 Action Points

The action points under **Aim / Priority 6: Monitoring and Review** are as follows:

Priority Area	Strategic Action
Monitoring Indicators	Devise and put in place a monitoring and evaluation framework.
Visitor Attitudinal Research	Carry out additional visitor surveys to help guide development.
Performance Indicators	Formulate performance indicators for inclusion in final Strategy document.

8 BUILDING ON THE FRAMEWORK

8.1 Prioritisation of Product Opportunities

At a Forest District level detailed product development opportunities have been identified for each forest considered, based on visitor market potential, social inclusion opportunities, forest sensitivities, access and partnership issues etc.

In considering the opportunity of individual forests for future mountain bike developments, the relative strengths and merits of each have been considered. At existing forests it is important to maintain visitor levels in the future, in light of potential new developments elsewhere in Scotland on the National Forest Estate. However due to the recent product evolution and the lack of accurate trail counters in place, visitor number quantification is at best sketchy and anecdotal. TRC have therefore had to be prudent in forecasting sustainable levels of future trail use. All proposed trail development opportunities in this document are necessary to maintain demand at the levels forecasted.

Greater product development and the introduction of enhanced central facilities on key sites could result in visitor numbers exceeding these more prudent projections. However this should be verified with detailed feasibility studies on each individual site before development proceeds. The impact of larger scale facilities on other sites needs to be tested to avoid displacement effects. TRC's visitor model methodology for this framework has minimised the impact of displacement.

A full economic appraisal reflecting the ambitions for key forest sites has been independently prepared and included as Appendix XIV.

Some forests have realistically very little potential due to location, ground conditions, poor access, attracting few users etc, while some have considerable opportunities for social inclusion, health and tourism.

All in all, from a market opportunity perspective, there is considerable potential at each Forest District level but the individual projects need to be prioritised in order to meet the aims and objectives of the Forest Cycling and Mountain Biking National Strategy. There also needs to be an indication of project development timing. However, this will largely be dictated by the availability of public sector funds.

The National Strategy has a slightly different emphasis to regional strategies in that there is a need to improve Scotland as a world-class cycling and mountain biking destination as a whole. Therefore the priority for product development has to be linked very closely to tourism destinations with an understanding of local conditions / agendas, social opportunities, funding availability, etc. This approach would echo VisitScotland and Scottish Enterprise strategies of promoting visitor hotspots in supporting city tourism (Edinburgh / Glasgow) and visitors to the National Parks, Cairngorm and Loch Lomond. Glentress is already certainly a national facility in that it provides a rural recreation experience linked to Edinburgh.

The key guiding principles and aims of the National Strategy are not just about economic development priorities however, but are also about access for all, rural economic development, health and wellbeing and sustainability (economic prioritisation is only one of nine factors considered). Full product development priorities covering a range of different criteria, at a national level, must therefore be set as part of the Strategy.

In order to achieve this, a product prioritisation matrix has been prepared and project priorities at a national level identified. At a community level it may be possible that priorities for certain projects be higher or at odds with the national priorities due to higher local social / health agendas, community enthusiasm / aspirations or funding availability. Local issues and priorities must be balanced and set against the national framework.

Each cycle product has already been positioned as being of national, regional or community significance – as highlighted in Appendix X.

The Prioritisation Matrix scores each project from 1 to 5 (5 being high priority, 1 being low priority) against a set of national criteria as follows:

PRIORITISATION MATRIX	
1	Number of visitors
2	Access for all – wide market base
3	Maximise use of forest as recreational resource – limits to other forms of recreation
4	Economic benefit – overnight tourist potential / destination links
5	Improve health, wellbeing and social inclusion credentials
6	Critical mass / world-class credentials
7	Profile – build and maintain FCS cycle profile
8	Partnership potential
9	Ease of achievement

Once the scores have been calculated for each project they are then considered as either: Essential, desirable, nice to have, or do not develop at each level of positioning (ie national, regional, community) unless part of wider recreational offer. For a full breakdown of scoring per individual forest, see Appendix IX.

PROJECT PRIORITISATION RANGES ADOPTED			
	Points		
	National	Regional	Community
Essential	40+	35+	30+
Desirable	35+	30-34	25-30
Nice to have	-	25-29	20-24
Do not develop or only develop if part of wider recreation offer	-	-	< 20

It is envisaged that FCS would drive forward and champion the development potential as capital funds allow, for both the national and regional facilities proactively looking for project partners, however at community facilities FCS will take a supporting role allowing others to lead and fund development. FCS will / should ensure quality controls, risk assessments, management practices, maintenance and sustainability has been effectively built into these community projects by the project promoters. For each development, FCS, community and project partners must identify likely future maintenance / management liabilities and requirements.

Product Development Summary

Based on our research findings, strategic positioning and product market fit analysis, as per our previous regional research studies. A summary of product development potential given the market opportunities identified, together with a national strategic priority and the next steps for all forests investigated is detailed in the following tables.

SUMMARY OF DEVELOPMENT POTENTIAL

Name of Forest	Key Market Opportunities	Strategic Positioning	Projected User Potential No. of Visitors			Key Development Recommendations	Strategic Priority / Cluster Effect
			Day	Overnight	Total		
National Facility							
Tweed / Glentress / Innerleithen	<ul style="list-style-type: none"> Consolidate existing markets; Encourage families, novices, older cyclist; Build better links to other activities / recreation in the forest and wider destination; Improve signage and interpretation events and public awareness; Day visitors – emphasis on East Coast, North of England and Edinburgh markets; Overnight packages linked to weekend short breaks; Links with accommodation providers / tour operators; Education / youth groups; Children's cycling club / tuition events. 	<ul style="list-style-type: none"> Maintain and consolidate the positioning of Tweed – Glentress and Innerleithen combined – as a national / internationally important, single track cycling destination. 	112,736	39,621	152,358	<ul style="list-style-type: none"> To improve quality of existing experience; New permanent forest visitor centre and car parking planned for all forest users; Readdress the recreational imbalance re walking etc; Improve red, blue and green trails; Improve freeride areas; Improve sustainability of red trails, see spooky wood; New trail sections and links; Control quality and maintenance; Innerleithen to continue developing / expanding / improving specialist downhill trails; Continue to improve links and marketing of Glentress with Innerleithen. Consider future transport links between Innerleithen and Glentress. 	<ul style="list-style-type: none"> National facility / essential development; High level of cluster effect with Innerleithen and 7stanes.
Leanachan	<ul style="list-style-type: none"> Events; Downhill – exclusive and intermediate market; Cross-country enthusiasts, SXC events; Downhill series, SDA events; Social inclusion, education programmes / schools; Families / children need more access / provision for the less capable rider; 2007 World Championship spin-offs; Epic links. 	<ul style="list-style-type: none"> A recognised national cycling facility, but needs further product development; Internationally recognised events destination. 	2,387	14,612	16,998	<ul style="list-style-type: none"> Reinvest / improve existing facilities / showers; Construct network of green, blue, red and black and single track cross-country routes; All ability trail / disabled possibility; Car park upgrade for 2007; Work with Nevis Range and others to produce another more accessible 'red level' downhill route. 	<ul style="list-style-type: none"> National facility / essential development; Focus on national events; High level of cluster effect with Lochaber Outdoor Capital – Laggan Wolfrax, Brecklett, Inchnacardoch etc.
Loch Ard / Queen Elizabeth Forest Park	<ul style="list-style-type: none"> Appeals to as wide a market base as possible; Day visitors from within a one-hour drive time, filling the market gap for Glasgow; Overnight tourists to destination Loch Lomond and the Trossachs National Park; Short break enthusiasts; VFR; Schools, youth groups, activity centres; Families and novices; Older cyclists; Single track enthusiasts; Epic / long-distance, cross-country market; Links to other forest recreational activities; Heritage-related market. 	<ul style="list-style-type: none"> A cycling facility for all, with national potential; National brand opportunities; Centralised service facilities linked to wider recreation. 	123,585	36,910	160,496	<ul style="list-style-type: none"> Opportunity for purpose-built national mountain bike facility in Loch Lomond and the Trossachs National Park; For all levels of the sport, green, blue, red and black trails to be developed; David Marshall Lodge area would form an ideal trail head but additional central facilities will have to be considered; Develop a quality / world-class / sustainable trail network system which appeals to a wide market base; Introduce freeride and dirt jump areas; Strategic links to wide number of Cross-Country Epics; Employ a full-time mountain bike / cycle ranger to manage, help maintain, check trails, provide customer interface and promote events; Consider other innovative recreation facilities. 	<ul style="list-style-type: none"> National facility / essential development; Focus on national event.

Note: For detailed market rationale and development see Regional Strategies.

SUMMARY OF DEVELOPMENT POTENTIAL (Cont'd)

Name of Forest	Key Market Opportunities	Strategic Positioning	Projected User Potential No. of Visitors			Key Development Recommendations	Strategic Priority / Cluster Effect
			Day	Overnight	Total		
Regional Facility							
Mabie	<ul style="list-style-type: none"> Short break visitors to area; Integrates with less-skilled end of cycle market; New entrants / novices / children; Linked with multi-users; Promote packages with hotel; Enthusiastic / cross-country cyclists. 	<ul style="list-style-type: none"> Regional facility, high day visitor usage; Key component of Dumfries, a regional mountain bike destination. 	11,988	13,352	25,341	<ul style="list-style-type: none"> Key recreational forest for Dumfries; 'Hub' for visiting cyclists looking to ride 'Dumfries' 7stanes; Green and blue loop extensions; Create skills area; Improve signage / awareness; Complete as part of 7stanes Phase II project. 	<ul style="list-style-type: none"> Regional facility / desirable development; Cluster effect re Dumfries 7stanes.
Ae	<ul style="list-style-type: none"> Dumfries and West and Central Scotland day visitor market; Overnight / short break tourists; Local bike clubs; Dumfries youth; Community / outreach programmes Enthusiast / cross-country riders; Downhillers and freeriders; Event / sprint competition riders. 	<ul style="list-style-type: none"> Key component of Dumfries, a regional mountain bike destination; Small regional facility to complement Mabie and Dalbeattie; Attractive for the Glasgow market. 	10,926	16,959	27,885	<ul style="list-style-type: none"> Long-term development; Add cross-country trails, blue and green trails, widen market appeal; Develop education and outreach project; Improve changing / toilet facilities; Complete as part of 7stanes Phase II project. 	<ul style="list-style-type: none"> Regional facility / desirable development; Cluster effect re Dumfries 7stanes.
Laggan Wolfrax	<ul style="list-style-type: none"> Local residents / day visitors from Fort William and Aviemore; Tourist visitor market linked to Nevis Range and Leanachan; Schools / social inclusion; Cross-country; VFR; Downhill market using Leanachan will use fun park for freeriding; Short sharp shock experience. 	<ul style="list-style-type: none"> Purpose-built, regional, single track mountain bike facility for the Cairngorm National Park; High repeat visitation destination. 	1,531	19,416	20,946	<ul style="list-style-type: none"> Create separate green route; Extract fun park and market as separate product; Add individual black obstacles / loops on red route; Extend red route; Add dirt jumping / skills park close to base camp; Consider extending fun park to better complement downhill Nevis Range products. 	<ul style="list-style-type: none"> Regional facility / desirable development; High level of cluster effect with Lochaber Outdoor Capital – Leanachan, Brecklett, Inchnacardoch, Glen Nevis.
Craigvinean	<ul style="list-style-type: none"> Novice riders; Day visitors and overnight tourists in Highland Perthshire; Weekend / short break tourists; Families / children; Youth, school and family groups; Downhill / event users; Caravan parks, campsites, self-catering. 	<ul style="list-style-type: none"> Regional cycling facility providing a web / network of shorter cycle trails aimed at overnight visitor product, novices, beginners and intermediates; Key fit with existing Highland Perthshire tourism activity providers. 	22,026	13,313	35,339	<ul style="list-style-type: none"> Create a network / web of cycle routes aimed at novice and intermediate cyclists; Links to The Hermitage, introduce shared central facilities; Introduce fun element ie skills area and bike sculpture trails; Target novice / tourist markets. 	<ul style="list-style-type: none"> Regional facility / desirable development; Some cluster effect with Laggan Wolfrax.

Note: For detailed market rationale and development see Regional Strategies.

SUMMARY OF DEVELOPMENT POTENTIAL (Cont'd)

Name of Forest	Key Market Opportunities	Strategic Positioning	Projected User Potential No. of Visitors			Key Development Recommendations	Strategic Priority / Cluster Effect
			Day	Overnight	Total		
Regional Facility (Cont'd)							
Cycle Crinan	<ul style="list-style-type: none"> Local residents; Freeriders; Cross-country / Epic-seeking market; Intermediate to advanced (Kilmichael); Families / low skill level (Knapdale); Overnight / short break tourist markets; Young children; Mini Epic markets. 	<ul style="list-style-type: none"> To become the regional focus of forest cycling and mountain biking in West Argyll; A Crinan focus will boost visitor credentials / appeal; Link to National Cycle Network and Epic product. 	1,704	12,153	13,857	<ul style="list-style-type: none"> Develop a high value sustainable trail system which appeals to a wide market base; Create green, blue and red trails (Phase I); Create signature black trail in longer term; Create skills areas; Provide shelter / toilets and bike wash at Achabreck. 	<ul style="list-style-type: none"> Regional facility / desirable development; Some cluster effect, Brecklett, Barcaldine.
Arran	<ul style="list-style-type: none"> Community / Arran Bike Club; Trailquest re youth groups, outdoor activity-type market; Arran Adventure; Families / children; Activity weekend / short break market. 	<ul style="list-style-type: none"> A regional <u>tourism</u> cycling destination; Links to culture and FCS recreational tourism and cross-island National Cycle Network. 	3,599	4,914	8,513	<ul style="list-style-type: none"> Expand Trailquest product; Improve strategic trails between Brodick and Lamlash; Support Arran Bike Club proposals to Glenashdale from Lamlash; Develop a skills loop and fun park. 	<ul style="list-style-type: none"> Small Regional facility / desirable development.
Brecklett	<ul style="list-style-type: none"> Local markets, social / educational and recreational; Epic / cross-country markets; Day visitors and overnight tourist market re critical mass of Lochaber; Cycle tourists linked to destination Lochaber; Linked to NTS Glencoe visitor centre. 	<ul style="list-style-type: none"> A regional tourism cycling destination with wide links to Lochaber – Outdoor Capital of the UK; Strong local / community support; Create significant overnight visitor market. 	1,589	9,391	10,980	<ul style="list-style-type: none"> Longer-term development; Develop red level cross-country trail system in two phases. Inter-linked trail loop to create critical mass of trail product; Construct skills loops and jump park; Create strategic links through Glencoe to Kinlochleven and West Highland Way. Epic product opportunities; Low level multi-access trails links to NTS centre; Longer-term development 3-5 years. 	<ul style="list-style-type: none"> Regional facility / nice to have development; High level of cluster effect with Lochaber Outdoor Capital.
Pitfichie	<ul style="list-style-type: none"> Mainly aimed at intermediate and advanced riders; Enthusiasts; Cross-country – downhill / events specialists. 	<ul style="list-style-type: none"> To become the regional off-road mountain biking facility for Grampian and Moray. 	7,502	8,035	15,537	<ul style="list-style-type: none"> Key focus is intermediate to advanced riders. However, as a regional facility it must also develop a network of trails at various levels to maximise market opportunity and widen market base. 	<ul style="list-style-type: none"> Regional facility / nice to have development; High level of cluster effect with Kirkhill.

Note: For detailed market rationale and development see Regional Strategies.

SUMMARY OF DEVELOPMENT POTENTIAL (Cont'd)

Name of Forest	Key Market Opportunities	Strategic Positioning	Projected User Potential No. of Visitors			Key Development Recommendations	Strategic Priority / Cluster Effect
			Day	Overnight	Total		
Community Facility							
Kirroughtree	<ul style="list-style-type: none"> Families and young children; Link to wider forest recreation; Local schools / youth groups / education-related; Short break visitors / enthusiasts link to 7stanes; Cyclists from outwith Dumfries and Galloway; 7stanes mountain bike 'route baggers'; Novices introduction to mountain biking. 	<ul style="list-style-type: none"> Has the opportunity to grow into a regional forest cycling and mountain biking destination; To link and package with other 7stanes products to enhance visitor experience; A good, wide recreation offer. 	5,097	18,482	23,579	<ul style="list-style-type: none"> Well-rounded product offering something for everyone; Renowned red and black trails; Develop education and outreach project; Black and blue trail extension; Define skills area; Improve signage; Improve public awareness of other user types; Complete as part of 7stanes Phase II project. 	<ul style="list-style-type: none"> Community facility / essential development; Link to Dumfries 7stanes, cluster with Glentroof.
Kirkhill	<ul style="list-style-type: none"> Local residents ie Aberdeen City and Shire; Local bike clubs and enthusiasts; Local schools / youth groups and social inclusion-type market; VFR market; High repeat visitations. 	<ul style="list-style-type: none"> Community facility which is fully inclusive for all and accessible to all in Aberdeen; High local community usage due to urban influence of Aberdeen. 	25,489	5,766	31,255	<ul style="list-style-type: none"> Blue, red and black loops recommended; Immediate development of novice / beginner level trail – maximise social inclusion potential. 	<ul style="list-style-type: none"> Community facility / essential development; High cluster effect with Pitfichie.
Fochabers	<ul style="list-style-type: none"> Local enthusiasts; Short break tourists visitors; Children and families; Schools / local youth groups; VFR. 	<ul style="list-style-type: none"> Community facility based around a very successful volunteer / cycle club network; Has good and growing social inclusion. 	7,877	4,712	12,589	<ul style="list-style-type: none"> Complete Ben Aigan, Ordiequish and Whiteash developments as previously proposed; Majority of developments to be completed by the summer of 2006. 	<ul style="list-style-type: none"> Community facility / desirable development.
Dalbeattie	<ul style="list-style-type: none"> Local community; Overnight visitors / short break visitors / adventure tourists; Package with other Dumfries 7stanes loci ie Ae and Mabie; Dumfries day visitor market; 7stanes 'baggers'. 	<ul style="list-style-type: none"> Community facility Types A, B and C; Key component of Dumfries, a regional mountain bike destination. 	5,766	8,917	14,684	<ul style="list-style-type: none"> Good local facility with strategic links to Dumfries; Locally driven project; Green and blue loop extension; Schools loop; Improve signage; Develop skills area; Complete as part of 7stanes Phase II Project. 	<ul style="list-style-type: none"> Community facility / desirable development; Cluster effect with Dumfries focus.
Learnie	<ul style="list-style-type: none"> Local residents, Inverness focus; Members of HIMBA; Serious mountain bike enthusiasts; Visiting friends and relatives; Short break / adventure tourist visitors; Mountain bike 'trail baggers'. 	<ul style="list-style-type: none"> Community facility Types A, B and C; Emphasis will be on local club members / enthusiasts; Serious mountain bikers are the focus; Opportunity for adventure tourists; Visiting friends and relatives. 	5,885	7,435	13,320	<ul style="list-style-type: none"> Phase I largely completed; Driven by local HIMBA aspirations; Investigate links for longer-term cross-country Epics; No further significant new trail development at this stage; Assess success of Phase I – work with HIMBA to identify future opportunities re possible Phase II developments. 	<ul style="list-style-type: none"> Community facility / desirable development.

Note: For detailed market rationale and development see Regional Strategies.

SUMMARY OF DEVELOPMENT POTENTIAL (Cont'd)

Name of Forest	Key Market Opportunities	Strategic Positioning	Projected User Potential No. of Visitors			Key Development Recommendations	Strategic Priority / Cluster Effect
			Day	Overnight	Total		
Community Facility (Cont'd)							
Carron Valley	<ul style="list-style-type: none"> Day visitors from North Lanarkshire and Stirling; Schools / educational groups; Local bike club use; Alternative recreation markets: walking, fishing, visitor attraction, horseriding; Social inclusion / health markets; VFR markets; Links to medieval fort. 	<ul style="list-style-type: none"> Community facility dominated by the Carron Valley Community Development Group; High level of usage for community facility due to large catchment population; Accessible to all; Become community recreational facility for walking / cycling / horseriding. 	38,177	9,995	48,172	<ul style="list-style-type: none"> Develop a network of blue and red trails; Longer-term development of black signature trail; Develop central facilities linked to wider recreation opportunities; Develop skills area for learning purposes, linked to outdoor education / life-long learning; Develop a product which is attractive to a wide market base. 	<ul style="list-style-type: none"> Community facility / desirable development.
Ardgartan	<ul style="list-style-type: none"> Day visitor potential – predominately Glasgow focused; Military activity market; Outdoor activity providers; Fitness / endurance market; Cross-country market. 	<ul style="list-style-type: none"> Community cycling facility with an emphasis on tourism opportunities and creating wider recreational links / product offerings to cyclists. 	6,960	10,629	17,533	<ul style="list-style-type: none"> Develop cross-country focus given wildness and 'big country' feel; Improve and re-sign existing three forest cycle routes; Promote Ardgartan Peninsula and other routes as part of Cross-Country Epic; Create links at Cat Craig, Succoth and Tarbet Isle. 	<ul style="list-style-type: none"> Community facility / desirable development.
Blairadam	<ul style="list-style-type: none"> Local bike club; Community groups; Outdoor activity centres; Fife – day visitors; Education heritage links; Schools / youth groups; Social inclusion / access for all. 	<ul style="list-style-type: none"> Community facility with emphasis being on inclusion for all; Accessible to all; Links to educational resources / Fife Council and local outreach initiatives ie Active Steps. 	37,142	9,317	46,459	<ul style="list-style-type: none"> Satisfy wide range of users; Create a network of single track products which satisfy local enthusiasts needs ie bike club as well as education potential; Green, blue and red trail developments; Possible WIAT initiative. 	<ul style="list-style-type: none"> Community facility / desirable development.
Glen Affric	<ul style="list-style-type: none"> Wilderness 'Big Country' Cross-country markets only; Opportunity for circular cross-country loops centred around Tomich; Wilderness Epics; New visitor centre is proposed in Glen Affric by NTS with short walks and multi-use trails – some limited low level cycling opportunity. 	<ul style="list-style-type: none"> Recognised as a destination for long-distance, cross-country / Epic riding; 10 Glens, community group focus. 	185	1,837	2,022	<ul style="list-style-type: none"> Focus for Epic routes; Cross-country endurance market; Build on routes already developed by the 10 Glens group and waymarked in Glen Affric area; Create Epic trails; FCS work closely with 10 Glens group. 	<ul style="list-style-type: none"> Community facility / desirable development; 10 Glens cluster.

Note: For detailed market rationale and development see Regional Strategies.

SUMMARY OF DEVELOPMENT POTENTIAL (Cont'd)

Name of Forest	Key Market Opportunities	Strategic Positioning	Projected User Potential No. of Visitors			Key Development Recommendations	Strategic Priority / Cluster Effect
			Day	Overnight	Total		
Community Facility (Cont'd)							
Glen Urquhart / Balnain	<ul style="list-style-type: none"> • Extreme sports, freeride, dirt jumpers; • This is a unique and great opportunity if well marketed; • Visiting friends and relatives; • Adventure sport tourist visitors; • Day visitors – Inverness; • Opportunity to showcase facility. 	<ul style="list-style-type: none"> • Community facility Types A and C; • To be promoted and marketed as a world-class niche product; • Differentiate product / adds value to the Scottish mountain biking brand. 	2,818	4,299	7,117	<ul style="list-style-type: none"> • Unique specialised product; • Positioned as a world-class extreme freeride product / destination; • Introduce longer freeride fun park product instead of downhill; • Introduce dirt jump park; • Create low level skills area for novice riders; • Link village with freeride park. 	<ul style="list-style-type: none"> • Community facility / desirable development; • 10 Glens cluster.
Newcastleton	<ul style="list-style-type: none"> • Families; • Young children and local youth groups; • Local residents in the surrounding villages; • Link to cross-country Epic trails, cross-border / Kielder; • 7stanes 'baggers'. 	<ul style="list-style-type: none"> • Community facility Types B and C. 	5,152	6,798	11,950	<ul style="list-style-type: none"> • Link into cross-border trails involving long-distance Epics; • Create closer ties / links with Kielder Forest; • Develop 2km of blue trail; • Improve signage re car parks, local events; • Develop education and outreach project; • Complete as part of 7stanes Phase II project. 	<ul style="list-style-type: none"> • Community facility / nice to have development; • Cluster effect with 7stanes.
Glentroll	<ul style="list-style-type: none"> • Day visitors; • Endurance riders / enthusiasts / adventure; • Fitness market; • Epic 'baggers / seekers'; • Overnight tourist visitors; • 7stanes 'baggers / seekers'. 	<ul style="list-style-type: none"> • Community facility Type C. Focus is cycle tourists coming to the area; • Overnight Epic adventure tourists. 	1,797	6,231	8,028	<ul style="list-style-type: none"> • Package within the wider Epic brand; • Develop blue single track for community use; • Become a recognised single track facility like all other 7stanes sites – see blue route development; • Car park extension; • Improve signage; • Complete as part of 7stanes Phase II project. 	<ul style="list-style-type: none"> • Community facility / nice to have development; • Cluster with Kirroughtree.
Dunoon	<ul style="list-style-type: none"> • Seasonal tourists; • Local / community markets; • Social inclusion / project for local youth; • Local schools outdoor education remit; • VFR; • Potential day visitor – Glasgow market re ferry links; • Caravan market. 	<ul style="list-style-type: none"> • Community facility with opportunities to grow / develop social inclusion around community-driven initiatives. 	6,538	1,837	8,376	<ul style="list-style-type: none"> • Work with community to develop a well-focused community facility; • Fun park, freeriding development; • Opportunity for bigger development, long-term five years plus. 	<ul style="list-style-type: none"> • Community facility / nice to have development; • Longer-term greater opportunity.

Note: For detailed market rationale and development see Regional Strategies.

SUMMARY OF DEVELOPMENT POTENTIAL (Cont'd)

Name of Forest	Key Market Opportunities	Strategic Positioning	Projected User Potential No. of Visitors			Key Development Recommendations	Strategic Priority / Cluster Effect
			Day	Overnight	Total		
Community Facility (Cont'd)							
Balblair / Carbisdale	<ul style="list-style-type: none"> Mountain bike enthusiasts / intermediate riders; Overnight short break tourists; Day-trippers – cycling Balblair and Carbisdale as one, linked via bridge / Sustrans route, link over Kyle of Sutherland; Outdoor activity-type packages / promotions; Part of 'regional product' destination (see Golspie cluster) promoting overnight short breaks; SYHA / market / links promoting recreational overnight visitor market; Short forest single track, cross-country blue route – family-friendly, longer forest road Epic opportunity at Carbisdale; Link / promote activity groups; Night rides (see SYHA); Single track enthusiasts ('Trail Baggers' Northern regional cluster). 	<ul style="list-style-type: none"> Community facility Types A and C. Local overnight enthusiasts and tourists. 	1,617	2,200	3,817	<ul style="list-style-type: none"> Link forests together; Carry out development as proposed; Based on heavy involvement / building from local volunteer groups; Consider possible extensions to the car park at Carbisdale; Funding secured; Link to overnight youth hostel market; Development ongoing; Opportunity to add future trail alterations to Balblair; NB: The trails will be machine only. No hand finishing. 	<ul style="list-style-type: none"> Community facility / nice to have development; Cluster effect with Golspie Northern regional single track.
Balmacara / Kyleakin	<ul style="list-style-type: none"> Local enthusiasts; Cross-country event rides; Limited number of tourist visitors (tourist visitors to area tend not to cycle – walk / sightsee); Local residents SLAM; Schools and local youth groups. 	<ul style="list-style-type: none"> Community facility Types A and B; Links to Glen Elg for adventure / touring. 	407	3,464	3,871	<ul style="list-style-type: none"> Blue trail development at Kyleakin with red / black loops to attract wider base; Improve signage at Balmacara / Kyleakin; Work closely with SLAM; Promote forest to widest possible market; Opportunities to sign mini Epic routes; Community-led timeframe; Potential to add skills development area. 	<ul style="list-style-type: none"> Community facility / nice to have development.
Inchnacardoch	<ul style="list-style-type: none"> Local children / youths direct links to Fort Augustus; School / youth groups; Family cycling along canals and on flat forest country; Visiting friends and relatives; Short break recreation visitors linked to Lochaber Outdoor Capital / Great Glen. 	<ul style="list-style-type: none"> Community facility Types A, B and C. This forest services all community facility criteria re Fort Augustus. It accommodates local enthusiasts, is accessible to all and it has an element of tourism opportunity. 	1,264	4,199	5,463	<ul style="list-style-type: none"> Create a focus for forest cycling at Fort Augustus; Introduce Epic products linked into Fort Augustus and Caledonian Canal; Work with partners and adjoining landowners to create strategic links; Improve overall signage; Work with local community; Create links to Glen Garry; Longer-term development proposed re Epic routes. 	<ul style="list-style-type: none"> Community facility / nice to have development; Cluster effect with Lochaber Outdoor Capital.

Note: For detailed market rationale and development see Regional Strategies.

SUMMARY OF DEVELOPMENT POTENTIAL (Cont'd)

Name of Forest	Key Market Opportunities	Strategic Positioning	Projected User Potential No. of Visitors			Key Development Recommendations	Strategic Priority / Cluster Effect
			Day	Overnight	Total		
Community Facility (Cont'd)							
Mull	<ul style="list-style-type: none"> Encourage more holiday tourists to cycle on Mull link with Morven and Lochaber; Local resident, to cycle safely off-road re health and fitness; Satisfy the needs of the local club enthusiasts cyclists; Encourage local school and wider community / youth group use. 	<ul style="list-style-type: none"> Community cycling facility Types A, B, and C. 	171	2,644	2,815	<ul style="list-style-type: none"> Community-led development for a blue route with red / black loops at Ardmore Point; Sign and create links between Tobermory and Ardmore Point; Work with Community Trust to create well-focused community development; Target visitor markets; Create circular route aimed at older people / families with children at Aros Park; Possibilities for 'off-road' round island cycle links in future – needs further investigation; Longer-term development potential. 	<ul style="list-style-type: none"> Community facility / nice to have development; Cluster effect with Lochaber / Morven.
Glen Garry	<ul style="list-style-type: none"> Family cycling; Cyclist utilising existing footpath network; Cross-country enthusiast market; Local residents / enthusiasts, night and winter riding opportunities. 	<ul style="list-style-type: none"> Positioned as a community facility; Service community aspirations; Tourism spin-off; Cross-country Epic trails. 	Not calculated			<ul style="list-style-type: none"> Create links to Caledonian Canal Towpath for beginners and the Great Glen Cycleway for touring cyclists; Create strategic forest cycling loops as proposed ie Bolinn Loop and the Laddie Loop; Improve signage. 	<ul style="list-style-type: none"> Community facility / nice to have development; Cluster effect with Lochaber Outdoor Capital.
Glen Righ	<ul style="list-style-type: none"> Short break / overnight visitors to the area; Local resident community; Local bike club enthusiasts; Vertical Descents users; Market linked to Leanachan / Brecklett re Lochaber Outdoor Capital. 	<ul style="list-style-type: none"> Community facility; Tourism opportunities re short break market; Satisfy local demand; Cycle through route links; Long-distance / lung bursting market; Epic branding opportunities. 	Not calculated			<ul style="list-style-type: none"> Link forest to West Highland Way (Lundavra). Create multi-user path; Link Fort William to North Ballachulish and Brecklett; Consider long-term link to Sustrans Oban to Fort William route. 	<ul style="list-style-type: none"> Community facility / nice to have development; Cluster effect with Lochaber Outdoor Capital.
Barcaldine	<ul style="list-style-type: none"> Local bike club – West Highland Wheelers; Caravan park / overnight tourists; Local events; Cross-country market; Night riding. 	<ul style="list-style-type: none"> Community facility with a key volunteer / community focus; Local bike club / local events; Short local excursion venue; Linkages to Epics. 	850	3,058	3,908	<ul style="list-style-type: none"> Community should take lead development; Sign downhill route; Health and safety risk assessment to be completed. 	<ul style="list-style-type: none"> Community facility / nice to have development; Some cluster effect with Brecklett.
Glen Nevis	<ul style="list-style-type: none"> Overnight / short break visitors; Local Fort William resident market; Long-distance cyclists re links to Sustrans network / Epics etc; Community / education / outreach opportunities; Evening winter cycling / night-riding. 	<ul style="list-style-type: none"> Community facility Types A, B and C with cycle through route potential; Main emphasis as a cycle destination is Type C with links to Lochaber Outdoor Capital, adds to overall critical mass. 	247	5,144	5,390	<ul style="list-style-type: none"> Longer-term development – not essential; Maximise links with Fort William; Create circular loop via old military road, peat track etc; Create strategic link with West Highland Way; Strategic benefits from linking to Lochaber Outdoor Capital. 	<ul style="list-style-type: none"> Community facility / nice to have development; Cluster effect, critical mass, Lochaber Outdoor Capital.

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SUMMARY OF DEVELOPMENT POTENTIAL (Cont'd)

Name of Forest	Key Market Opportunities	Strategic Positioning	Projected User Potential No. of Visitors			Key Development Recommendations	Strategic Priority / Cluster Effect
			Day	Overnight	Total		
Community Facility (Cont'd)							
Fauldhouse	<ul style="list-style-type: none"> Attract local resident population 15-30 minutes drive from forest; VFR market; Local schools, education and high social inclusion market; Outreach programme potential; WIAT. 	<ul style="list-style-type: none"> Community facility driven by community and education market; Not a visitor destination; Locals / youths. 	14,401	2,521	16,923	<ul style="list-style-type: none"> Create short novice trail aimed at local residents / schools / social inclusion; Driven by Community under the WIAT Initiative; Possible freeride development in future; Control points on multi-access trails. 	<ul style="list-style-type: none"> Community facility / nice to have development.
Rumster	<ul style="list-style-type: none"> Local recreational facilities for local Wick / Thurso residents; Fitness enthusiasts on existing multi-access trail; Older couples / day out cycling; Local bike club community / youth groups, single track potential. 	<ul style="list-style-type: none"> Community facility Types A and B; Some limited tourism potential. 	1,517	504	2,021	<ul style="list-style-type: none"> Work with local community cycle enthusiasts; Develop well-focused fun and skills area; Work closely with community groups and schools; Longer-term development; Small-scale development for local residents. 	<ul style="list-style-type: none"> Community facility / nice to have development.
Rosehall	<ul style="list-style-type: none"> Limited market opportunities – distance from market, small catchment population – limited tourist infrastructure; Some limited potential for overnight cycling and other recreation visitors whilst on holiday; Family market possibilities although limited volume due to isolated location; Work with local community. 	<ul style="list-style-type: none"> Community facility Types A and B; Servicing local resident demand. 	395	413	808	<ul style="list-style-type: none"> Improve signage and information on existing route; Worked closely with local community; Upgrade wildwood trail for family cycling experience – multi-use trail; Part of Epic brand; Not essential but longer-term project. 	<ul style="list-style-type: none"> Community facility / nice to have development.
Morven	<ul style="list-style-type: none"> Encourage more people to cycle whilst in the area – Mull attracts 140,000 visitors per year; Package forest recreation products with local accommodation providers to promote overnight stay; Families with older children – see Aros Park; Older people – those currently walking, wildlife watching, link with opportunity of cycling; Epic opportunities from mainland – Corran Ferry re links to Lochaber / Fort William cyclists; Work with local community youth group; Market recreation together with Mull; Epic brand opportunities. 	<ul style="list-style-type: none"> Community facility Types A and C; Epic brand opportunities. 	115	717	832	<ul style="list-style-type: none"> Majority of multi-use trails now complete; Need to add short sections to complete Eileen loop. Need to negotiate with landowner first; Short-term development proposed. 	<ul style="list-style-type: none"> Community facility / only develop if part of wider recreation offer; Cluster effect with Mull / Morven.

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SUMMARY OF DEVELOPMENT POTENTIAL (Cont'd)

Name of Forest	Key Market Opportunities	Strategic Positioning	Projected User Potential No. of Visitors			Key Development Recommendations	Strategic Priority / Cluster Effect
			Day	Overnight	Total		
Community Facility (Cont'd)							
Fearnoch	<ul style="list-style-type: none"> Family cycling; Day visitors; Older, younger and less able visitors; Schools / young children; Local / recreation community use. 	<ul style="list-style-type: none"> Community facility offering wide access / inclusion for all as well as tourism spin-off re access to Oban / VFR markets. 	424	4,075	4,499	<ul style="list-style-type: none"> Sign larger forest road loop; Improve interpretation for multi-users; Manage walker conflicts; Put in trail control points. 	<ul style="list-style-type: none"> Community facility / only develop if part of a wider recreation offer.
Carradale	<ul style="list-style-type: none"> Local community; Families; Overnight tourists; Caravan Park / camping; Day visitors from Campbelltown; Long-distance touring. 	<ul style="list-style-type: none"> Community facility with wider access / inclusion for all and small-scale tourism links / benefits; Improves tourism / recreation infrastructure in the local area. 	396	1,039	1,435	<ul style="list-style-type: none"> Improve signage; Multi-user trails; Link to Kintyre Way, long-distance touring potential. 	<ul style="list-style-type: none"> Community facility / only develop if part of a wider recreation offer; Some limited cluster effect with Crinan.
Sunart Oakwoods	<ul style="list-style-type: none"> Opportunity to attract multi-use circular routes for visitors – suitable for a limited number of walkers and cyclists; A recreational visitor market rather than purely cyclist – cycling is another recreational activity; Visiting couples and older families; Strategic link possibilities re Glenfinnart. 	<ul style="list-style-type: none"> Community facility Type C; Locally developed initiative but the main emphasis is tourism / short break visitors et al. 	20	516	536	<ul style="list-style-type: none"> Provide a focus for recreational cycling at Polloch; Sign Glenhurich out and back route; Create Loch Doilet circular route; Create car park at Loch Doilet; Develop multi-access trails for cycling and forest walking – multi-use as part of wider recreational offer; Work with partners to create strategic multi-user links. 	<ul style="list-style-type: none"> Community facility / only develop if part of wider recreation offer; Cluster effect with Morven.
Borgie	<ul style="list-style-type: none"> Local community opportunities; Local schools / children; Visiting friends and relatives; Some / limited visitor / tourist use. 	<ul style="list-style-type: none"> Community facility Type A, driven by community; Focus is families, schools and social inclusion; Novice market. 	215	252	467	<ul style="list-style-type: none"> Work with community and landowners to gain links across River Naver, opening up longer circular walking and cycling opportunities; Work with youth on small section of single track. 	<ul style="list-style-type: none"> Community facility / only develop if part of wider recreation offer.
Morangie	<ul style="list-style-type: none"> Family cycling possibilities; Local residents only; Promote linkages with other forests; Limited market opportunities. 	<ul style="list-style-type: none"> Actively restrict this sensitive forest; Community facility for local residents only. 	Not calculated			<ul style="list-style-type: none"> Better sign existing forest roads loop; Actively discourage single track developments due to environmental sensitivities. 	<ul style="list-style-type: none"> Community facility / only develop if part of wider recreation offer.
Glenbranter	<ul style="list-style-type: none"> Weekend markets; Outdoor activity centres; Schools outdoor education remit; Older visitors; Epics. 	<ul style="list-style-type: none"> Community facility predominantly targeting tourists in the area; Opportunity to build overnight visitor market. 	473	3,646	4,118	<ul style="list-style-type: none"> Improve signage and linkages; Epic product along east shore of Loch Eck; Low level Epic for families along west bank of Loch Eck. 	<ul style="list-style-type: none"> Community facility / only develop if part of wider recreation offer; Cluster effect Argyll Forest Park, Epics etc.

Note: For detailed market rationale and development see Regional Strategies.

SUMMARY OF PRIORITISATION RECOMMENDATIONS

Name of Forest	Strategic Priorities	Strategic Development – Notes	Suggest Strategic Development / Degree of Priority and Next Steps
National Facility			
Tweed / Glentress / Innerleithen	National Facility / Essential Development	<ul style="list-style-type: none"> Consolidate existing, maximise novice use; Readdress recreational imbalance re walkers; Develop permanent central facilities for all forest users; Significant economic input generated for Southern Scotland. 	<ul style="list-style-type: none"> High priority; Develop permanent central facilities.
Leanachan	National Facility / Essential Development	<ul style="list-style-type: none"> To build and maintain FCS international profile / brand; Widen market base and offer access for all ie from downhill to cross-country to 4-Cross; Upgrade / reinvest resources in time for 2007 event. 	<ul style="list-style-type: none"> High priority; Product development to ensure completion in time for 2007 World Championships.
Loch Ard / Queen Elizabeth Forest Park	National Facility / Essential Development	<ul style="list-style-type: none"> To become a truly world-class cycling facility – a showcase for Scotland; It will build and maintain FCS forest cycle and mountain biking brand; Maximise use of forest as a recreation resource. 	<ul style="list-style-type: none"> High priority; Carry out detailed planning of future scheme.
Regional Facility			
Mabie	Regional Facility / Desirable Development	<ul style="list-style-type: none"> Forest has significant one-hour population catchment; Focus for Dumfries residents re day visitor cyclists; Improve health, wellbeing and social inclusion credentials of Dumfries; Important part of Dumfries cluster, long history of mountain biking; Well-known single track product – suitable for all levels of user; Complete 7stanes project Phase II developments. 	<ul style="list-style-type: none"> High priority; 7stanes Phase II complete as planned.
Ae	Regional Facility / Desirable Development	<ul style="list-style-type: none"> Attracts Dumfries and West and Central Scotland day visitor market; Red, green, blue and downhill trails focus; Shift from enthusiast market to catering for all markets; Attractive to the Glasgow market; Part of Dumfries cluster; Complete 7stanes project Phase II developments. 	<ul style="list-style-type: none"> High priority; 7stanes Phase II complete as planned.
Laggan Wolfrax	Regional Facility / Desirable Development	<ul style="list-style-type: none"> Differentiated product helping to build and maintain FCS cycling profile / brand; Generating economic benefit to area re jobs / accommodation; Well packaged positioned alongside other Lochaber products to attract an overnight / short break tourist market; Widening market base re short sharp experience. 	<ul style="list-style-type: none"> High priority; Complete existing. Plan for future.
Craigvinean	Regional Facility / Desirable Development	<ul style="list-style-type: none"> Tourist activity provider; Integrated facility – café, toilets and car park; Promote forest for fun, families, schools, youth groups and day / overnight visitors; Will add to the profile / quality FCS forest cycling and maintain bike product; Significant economic impact across Perthshire. 	<ul style="list-style-type: none"> Medium priority; Plan scheme – discussions with NTS, outdoor activity providers, other partners etc.
Cycle Crinan	Regional Facility / Desirable Development	<ul style="list-style-type: none"> Attract wide market base – link to Crinan Canal re family cycling; Differentiated product will attract high numbers of overnight visitors – economic impact benefits; Destination Crinan is a more valuable and effective marketing / packaging method; Improve tourism / recreational provisions in West Argyll. 	<ul style="list-style-type: none"> Medium priority; Continue to improve existing Fire Tower Trails / prepare detailed phased plan for future.
Arran	Small Regional Facility / Desirable Development	<ul style="list-style-type: none"> Maintain Arran's reputation as a renowned UK cycle destination (albeit round); Satisfy demand for off-road provisions in Arran re safety issues; Attractive as a short break / weekend destination; Can cycle direct from ferry. 	<ul style="list-style-type: none"> Medium priority; Plan with community.

SUMMARY OF PRIORITISATION RECOMMENDATIONS (Cont'd)

Name of Forest	Strategic Priorities	Strategic Development – Notes	Suggest Strategic Development / Degree of Priority and Next Steps
Regional Facility (Cont'd)			
Brecklett	Regional Facility / Nice to Have Development	<ul style="list-style-type: none"> • Medium to long-term development; • Build / enhance Glencoe brand as a renowned Lochaber outdoor activity destination for Scotland; • The development has little health, wellbeing and social inclusion credentials, however it does build and maintain FCS cycle profile and helps to building Scotland's critical mass of world-class facilities; • Difficult project to achieve – time and felling issues to be considered. 	<ul style="list-style-type: none"> • Medium priority; • Longer-term development opportunity; • Develop only as part of Lochaber Outdoor Capital.
Pitfichie	Regional Facility / Nice to Have Development	<ul style="list-style-type: none"> • Creates overnight visitors to local / rural areas and will play an important role in bringing economic benefit to local Donside area; • Provides a regional level purpose-built facility in the North East of Scotland ie satisfied market; • Not strategically critical; • Limited critical mass of visitors; • Hard project / development to achieve. 	<ul style="list-style-type: none"> • Medium priority; • Longer-term development opportunity.
Community Facility			
Kirroughtree	Community Facility / Essential Development	<ul style="list-style-type: none"> • Focus for families and young children; • Form short break / weekend package with Glentool or other 7stanes sites; • Trails becoming better known with cycling fraternity; • Building high media awareness; • Complete 7stanes project Phase II developments. 	<ul style="list-style-type: none"> • High priority; • 7stanes Phase II complete as planned.
Kirkhill	Community Facility / Essential Development	<ul style="list-style-type: none"> • Showcase local / high population catchment forest; • Improving health, wellbeing and social inclusion credentials for Aberdeen City; • Creates wider access opportunities for recreation in local forest; • High visitor numbers / repeat visits; • Not integral to the FCS cycle profile or international standing; • WIAT opportunities. 	<ul style="list-style-type: none"> • High priority; • Continue with planned development, investigate WIAT links.
Fochabers	Community Facility / Desirable Development	<ul style="list-style-type: none"> • Already well developed in partnership with FCS; • Good network of single track trails with target novices, intermediate and advanced riders; • Project is very easy to achieve. The community / FCS partnership is a very successful model. 	<ul style="list-style-type: none"> • High priority; • Continue to work with community volunteers to complete development.
Dalbeattie	Community Facility / Desirable Development	<ul style="list-style-type: none"> • Dalbeattie Slab – very well known; • Strong support / involvement from local community; • Good links to local accommodation providers; • Part of Dumfries cluster focus; • Complete 7stanes project Phase II developments. 	<ul style="list-style-type: none"> • Medium priority; • 7stanes Phase II complete as planned.
Learnie	Community Facility / Desirable Development	<ul style="list-style-type: none"> • Driven by local enthusiasts with FCS involvement; • No novice trail; • Part of Northern Scotland cluster – package for overnight / short break cyclists; • Mainly attracts Inverness day visitors; • Generate economic benefit to local / rural areas. 	<ul style="list-style-type: none"> • Medium priority; • Phase I largely complete; • Phase II timeframe driven by others re clubs / develop as funding and demand allows.

SUMMARY OF PRIORITISATION RECOMMENDATIONS (Cont'd)

Name of Forest	Strategic Priorities	Strategic Development – Notes	Suggest Strategic Development / Degree of Priority and Next Steps
Community Facility (Cont'd)			
Carron Valley	Community Facility / Desirable Development	<ul style="list-style-type: none"> Widen / maximise market base of Carron Valley forest re recreational provisions; Significant partnership approval ie easier project to fund and implement; Generate high repeat visitor usage; Good community facility; WIAT opportunities should be explored; Innovative ongoing maintenance schemes need consideration. 	<ul style="list-style-type: none"> Medium priority; Timeframe driven by others; Plan to open March 2006; Closer liaison with Carron Valley Development Group required; FCS advisory role on management, maintenance, health and safety and future project development planning.
Ardgartan	Community Facility / Desirable Development	<ul style="list-style-type: none"> Maximises use of forest as a recreational resource – links to other forms of recreation are also integral to this development; Specific cross-country / endurance market only. 	<ul style="list-style-type: none"> Medium priority; Medium term plan in association with Loch Lomond and the Trossachs National Park.
Blairadam	Community Facility / Desirable Development	<ul style="list-style-type: none"> Will attract significant visitor volumes. The vast majority will be local day visitors / residents; Therefore there will be limited economic benefit to the local / regional area; Will have excellent social / health and wellbeing benefits to the Fife region; Important and essential off-road product for Fife – complement Fife Millennium Cycleway; WIAT opportunities. 	<ul style="list-style-type: none"> Medium priority; Timeframe driven by others; Manage community aspirations, health and safety and project advice.
Glen Affric	Community Facility / Desirable Development	<ul style="list-style-type: none"> Epic product, long-distance cross-country demand; Links to 10 Glens brand; Recognised cross-country Epic mountain bike destination; Narrow market base – enthusiast. 	<ul style="list-style-type: none"> Medium priority niche product; 3-5 years development timeframe.
Glen Urquhart / Balnain	Community Facility / Desirable Development	<ul style="list-style-type: none"> World-class freeride development; Niche / differentiated product; Raise profile / awareness of sport; Narrow market only – extreme sport credentials; Cluster links to 10 Glens brand; Links to Leanachan re World Championships 2007 re showcase / legacy. 	<ul style="list-style-type: none"> Medium priority niche product; Continually upgrading and improving aspects of product; Medium to longer-term initiative; Ensure maintenance and record keeping is up to date.
Newcastleton	Community Facility / Nice to Have Development	<ul style="list-style-type: none"> Cross-border forest – opportunity to increase tourist visitor numbers; Expand links to Kielder Forest; Active local volunteer base; Links to Epic trails; Part of 7stanes cluster; Complete 7stanes project Phase II developments. 	<ul style="list-style-type: none"> Medium priority; 7stanes Phase II complete as planned.
Glentool	Community Facility / Nice to Have Development	<ul style="list-style-type: none"> Epic / wilderness trail; Opportunities to widen market re develop blue trail; Links to Kirroughtree – South-West Scotland focus; Part of 7stanes cluster; Complete 7stanes project Phase II developments. 	<ul style="list-style-type: none"> Medium priority; 7stanes Phase II complete as planned.
Dunoon	Community Facility / Nice to Have Development	<ul style="list-style-type: none"> A community development would have a significant benefit on the health, wellbeing and access for all local / community residents; Small-scale development; WIAT opportunities / outreach school initiatives. 	<ul style="list-style-type: none"> Low priority; Need to identify community champion before any planning can take place.

SUMMARY OF PRIORITISATION RECOMMENDATIONS (Cont'd)

Name of Forest	Strategic Priorities		Suggest Strategic Development / Degree of Priority and Next Steps
Community Facility (Cont'd)			
Balblair / Carbisdale	Community Facility / Nice to Have Development	<ul style="list-style-type: none"> • Attract overnight visitors to the area; • High cluster effect with Golspie – private facility being developed; • Part of a wider regional package; • Driven by local community and supported by FCS; • Standalone forest developments only. 	<ul style="list-style-type: none"> • Medium priority; • Currently being developed.
Balmacara / Kyleakin	Community Facility / Nice to Have Development	<ul style="list-style-type: none"> • Create blue trail at Kyleakin with red / black loops; • Work closely with SLAM; • Improve signage at Balmacara and Kyleakin; • Sign mini Epic routes. 	<ul style="list-style-type: none"> • Medium priority; • Advisory role to community-driven project; • Ensure enthusiasts are aware of health and safety and maintenance risks.
Inchnacardoch	Community Facility / Nice to Have Development	<ul style="list-style-type: none"> • Community-led development with full backing of local FCS; • Part of 10 Glens project and its vision for the area; • Focus for forest cycling at Fort Augustus; • Create strategic links; • Cluster effect at Great Glen / 10 Glens and Lochaber Outdoor Capital. 	<ul style="list-style-type: none"> • Medium priority; • Advisory role work with community and local youth.
Mull	Community Facility / Nice to Have Development	<ul style="list-style-type: none"> • Overnight tourist visitor cycle market potential; • Island destination appeal; • Cluster with Morven; • Community demand – day visitors; • Improve health and wellbeing of the local community – link to schools / youths. 	<ul style="list-style-type: none"> • Medium priority; • Longer-term development; • Advisory, plan future project with community.
Glen Garry	Community Facility / Nice to Have Development	<ul style="list-style-type: none"> • Create links to Caledonian Canal Towpath; • Create strategic links as proposed – Bolinn Loop and Luddiewood; • Market new loops under the Epic brand. 	<ul style="list-style-type: none"> • Medium priority; • Longer-term development opportunity, link paths as funds become available.
Glen Righ	Community Facility / Nice to Have Development	<ul style="list-style-type: none"> • Opportunity to create multi-user link with West Highland Way; • Feasibility of terrain, cost and landowner consent required; • Consider long-term links to Sustrans Oban to Fort William route. 	<ul style="list-style-type: none"> • Medium priority; • Longer-term development opportunity.
Barcaldine	Community Facility / Nice to Have Development	<ul style="list-style-type: none"> • Local community / access for all; • Events destination which will help to create maximum economic benefit; • Will not improve / enhance profile / status of FCS cycling. No wider national benefits, only community. 	<ul style="list-style-type: none"> • Low priority; • Advisory only.
Glen Nevis	Community Facility / Nice to Have Development	<ul style="list-style-type: none"> • Visitor pressures high in forest; • All-ability trails only; • Easy access for local Fort William market; • Cluster links to Leanachan; • Access for all. 	<ul style="list-style-type: none"> • Low priority; • Longer-term development opportunity.
Fauldhouse	Community Facility / Nice to Have Development	<ul style="list-style-type: none"> • Health, wellbeing and social / access for all. Maximising links to WIAT initiative; • Little no economic benefit to area; • Community-focused development ensuring access for all. 	<ul style="list-style-type: none"> • Low priority; • Timeframe driven by others; • FCS advisory role to Council and community re development, management, maintenance and health and safety.

SUMMARY OF PRIORITISATION RECOMMENDATIONS (Cont'd)

Name of Forest	Strategic Priorities	Strategic Development – Notes	Suggest Strategic Development / Degree of Priority and Next Steps
Community Facility (Cont'd)			
Rumster	Community Facility / Nice to Have Development	<ul style="list-style-type: none"> Local access re remote / rural areas; Links to social inclusion / school opportunities; Environmental sensitivities; Community has aspirations to develop formal trails; Small-scale development opportunity. 	<ul style="list-style-type: none"> Low priority; Timeframe driven by others; FCS advisory role.
Rosehall	Community Facility / Nice to Have Development	<ul style="list-style-type: none"> Improve signage and information; Work with community – small-scale development only; Limited market opportunities; Family market. 	<ul style="list-style-type: none"> Low priority; Work with community to improve signage; Timeframe driven by others; FCS advisory role.
Morven	Community Facility / Only Develop if Part of Wider Recreation Offer	<ul style="list-style-type: none"> Facility for local people and visitors; Package with Mull, Sunart Oakwoods and Lochaber; Support from local community; Complete circular trail – negotiation with landowner. 	<ul style="list-style-type: none"> High priority; Immediate development – negotiate with landowner.
Fearnoch	Community Facility / Only Develop if Part of a Wider Recreation Offer	<ul style="list-style-type: none"> Generates little visitor demand / usage; Little value / benefit to national cycling future; Will not enhance Scotland's product offering / brand awareness etc. 	<ul style="list-style-type: none"> Low priority; Part of wider recreation offer (see long-distance routes).
Carradale	Community Facility / Only Develop if Part of a Wider Recreation Offer	<ul style="list-style-type: none"> Will not generate significant visitor levels; No national benefit; No benefit / impact on future of Scottish forest cycling and mountain biking. 	<ul style="list-style-type: none"> Low priority; Part of wider recreation offer.
Sunart Oakwoods	Community Facility / Only Develop if Part of Wider Recreation Offer	<ul style="list-style-type: none"> Provide a focus for recreational cycling at Polloch / Loch Doilet; Dramatic landscape and good views; Multi-user routes, limited number of users; Adventure visitor market; Strategic recreation links possible re Sunart Oakwoods. 	<ul style="list-style-type: none"> Low priority; Timeframe driven in partnership with Sunart Oakwoods.
Borgie	Community Facility / Only Develop if Part of Wider Recreation Offer	<ul style="list-style-type: none"> Strategic links; Work with community re youth skills area; Out and back circular forest cycle route. 	<ul style="list-style-type: none"> Low priority; Timeframe driven by others; FCS advisory.
Morangie	Community Facility / Only Develop if Part of Wider Recreation Offer	<ul style="list-style-type: none"> Do not develop single track – actively discourage; Better sign existing forest road loops; Work with existing landowners and consider longer Epic-type opportunities. 	<ul style="list-style-type: none"> Medium priority; Maintain / improve signage; FCS advisory.
Glenbranter	Community Facility / Only Develop if Part of Wider Recreation Offer	<ul style="list-style-type: none"> Generates few visitors; Will not add value to existing FCS forest cycling and mountain biking provisions. It will not enhance / develop the FCS cycling brand; Limited development potential / benefit. 	<ul style="list-style-type: none"> Low priority; Develop Epic credentials only with partners.

Note: Other forest areas have been evaluated at a regional level such as: Camster, Naver, Glen Elg, Glen Orchy, Garadhban, East Shore of Loch Lomond, Strathyre, The Bin (Huntly), Blackcraigs, Erochty, Callander Crags, Tyndrum, Glen Isla. These have not been reported in this framework document due to limited market potential or through route opportunities.

8.2 FCS Strategic Development Involvement / Role in Response to Product Positioning

8.2.1 A Framework

In response to the strategic positioning and market opportunities identified, a suggested product development approach outlining FCS' future role at each level has been suggested.

Each product must be considered on its own merits at a Forest District level, given the potential impact of cycle development on the local economy or to deliver health, social and other benefits. However, overall ongoing affordability must also be factored in.

At a national level the ambition for FCS strategic impact to product development should be largely as follows:

- **National** FCS to champion trail development;
FCS key development funders;
FCS to engage partners at a national level;
FCS to completely control development;
FCS to control timeframe / phasing;
FCS to ensure sustainability / maintenance;
FCS to promote and grow market;
Indicative overall capital cost range £1 million to £3 million;
FCS investment level £millions.
- **Regional** FCS to lead development;
FCS to engage regional and other partners;
FCS control / management quality;
FCS, with partners, to ensure regional / destination links;
FCS, with partners, to maximise tourism potential;
With partners FCS to ensure sustainability / maintenance;
Indicative overall capital cost range £200,000 to £1 million.
FCS investment level £hundreds of thousands.

- **Community** Project driven by clubs and communities;
Timescale driven by others (not FCS);
FCS to consider contributing to funding on project-by-project basis given economic / health and strategic consideration;
Community to engage other partners;
Community and partners to demonstrate trail sustainability;
FCS to ensure quality of development meets market needs, national grading and brand image;
FCS to inspect and advise on route development;
Indicative overall capital cost range <£500,000;
Essential and desirable projects – FCS investment level £tens to hundreds of thousands;
Nice to have / links <£200,000 – FCS investment level £tens of thousands.
- **Epic Routes** FCS to champion route investigations;
FCS to work with national / regional partners / key landowners;
FCS to brand and market with VisitScotland / Sustrans etc;
FCS, together with partners, to identify and agree maintenance regimes / levels;
FCS investment level £tens to hundreds of thousands.
- **Cluster** FCS to work with Forest Districts to champion mountain bike cluster approach;
FCS to work with partners or wider cluster recreation provisions;
FCS to brand and market clusters / potential links with VisitScotland;
FCS and partners to work with visitor accommodation sector in packaging and promoting cluster / destination.

8.2.2 Conclusion

This framework document outlines an ambition and quantifies the considerable market opportunity for forest cycling and mountain biking on the National Estate, throughout Scotland both at a local and national level.

This detailed research document should be used as a tool to help guide FCS in the formulation of their future forest cycling / mountain biking recreation strategies. The document helps give direction and prioritisation of future projects from a national perspective and gives a balance and focus to development. However, the overall cost and ongoing maintenance liability is considerable but so are the economic, social, health and community benefits.

TRC believe that the overall ambition outlined in the framework is achievable and should be a target for FCS strategies even though, in the short term, the availability of public sector funding re both FCS and key partners may be limited.

In today's climate, given the limited availability of public sector monies for all agencies including FCS and the uncertainty over the future of European funding sources, the guiding principle of affordability must be realistically considered. This is not just about capital monies but the ongoing commitment to maintenance and management. Ongoing revenue implications need to be quantified and clearly understood before future product commitments are made.

Forest cycling and mountain biking is full of success stories but there needs to be a pragmatic approach in the short term. There needs to be a period of consolidation and improvement to existing products, facilities, management and maintenance practices before moving on with full scale development. However FCS together with partners must plan for the future more efficiently so that opportunities can be exploited and areas of key development can be identified and ambitions met when funding conditions allow.

In the short term the following should be considered on a priority at a strategic level:

- Improve general forest cycling and mountain biking project management;
- Better understand and monitor maintenance liabilities at existing sites;
- Improve and build up better cost database and carryout better evaluation of existing products to help guide future development;
- Complete health and safety project work which has now been started. Develop policies and good practice guidelines. Introduce and operate effective systems and record keeping;
- Work on quality standards development and link to health and safety;
- Further developments, refinements to trail grading and system of trail checking is required;

- Developments required to improve marketing, branding, communicating and visitor interpretation;
- Need to consolidate existing national centres – Glentress and support 2007 World Championships at Leanachan with appropriate capital improvements / development;
- Need to consolidate and improve current trails at existing / potential regional centres within available resources;
- Need to finish existing commitments (see 7stanes) before starting development of large new projects;
- Need to start to develop project plans together with partners for key strategic centres ie Trossachs National Centre and regional centres;
- In the short term FCS needs to strengthen their advisory role and links with community and volunteer projects. Areas where FCS needs to concentrate include making partners aware of: liabilities, risks, maintenance requirements, need for quality, grading trails policies, record keeping etc.

As a way forward it is recommended that FCS use this framework document as an ambition, the basis for the development of a Forest Cycling and Mountain Biking National Strategy.

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APPENDIX I

Comparison of Catchment Size – Populations Within a One-Hour Drive Time and Mountain Bike Trips From Key Centres of Population

COMPARISON OF CATCHMENT SIZE – POPULATIONS WITHIN A ONE-HOUR DRIVE TIME	
Name of Forest	Population Within One Hour
National Facility	
Tweed / Glentress / Innerleithen	1,229,600
Leanachan	19,890
Loch Ard / Queen Elizabeth Forest Park	2,354,002
Regional Facility	
Mabie	199,807
Ae	364,204
Laggan Wolfrax	25,510
Craigvinean	734,185
Cycle Crinan	20,287
Arran	4,986
Brecklett	26,483
Pitfichie	333,442
Dunrobin Estate / Golspie	31,039
Community Facility	
Kirroughtree	84,952
Kirkhill	424,815
Fochabers	150,034
Dalbeattie	137,286
Learnie	81,735
Carron Valley	2,827,942
Ardgartan	966,713
Blairadam	2,751,284
Glen Affric	15,380
Glen Urquhart / Balnain	97,851
Newcastleton	171,738
Glentool	149,716
Dunoon	544,826
Balblair / Carbisdale	35,936
Balmacara / Kyleakin	4,527
Inchnacardoch	70,239
Mull	1,904
Glen Garry	N/A
Glen Righ	N/A
Barcaldine	23,623
Glen Nevis	18,276
Fauldhouse	3,000,263
Rumster	25,290
Rosehall	16,449
Morven	3,825
Fearnoch	18,843
Carradale	10,571
Sunart Oakwoods	664
Borgie	1,491
Morangie	N/A
Glenbranter	35,004

MOUNTAIN BIKE TRIPS FROM KEY CENTRES OF POPULATION			
Population Centre	One-Hour Drive Time	One-Hour Population Who Mountain Bike	Potential Number of Local Resident Trips Per Year
Aberdeen	412,035	24,722	185,415
Inverness	164,056	9,843	73,822
Fort William	18,630	1,117	8,377
Oban	21,888	1,313	9,847
Perth	1,592,400	95,544	716,580
Glasgow	3,263,389	195,803	1,468,522
Edinburgh	2,808,592	168,515	1,263,862
Dumfries	260,991	15,659	117,442

Note: There is market overlap and double counting as the same local residents could be quantified in more than one population centre ie if you live in Stirling for example you could be counted in the Perth, Edinburgh and Glasgow one-hour isochrones.

APPENDIX II

Potential Number of Users to Each Forest

POTENTIAL NUMBER OF USERS TO EACH FOREST			
Name of Forest	Number of Trail Users	Total Day Visitors	Total Overnight Visitors
National Facility			
Tweed / Glentress / Innerleithen	152,358	112,736	39,621
Leanachan	16,998	2,387	14,612
Loch Ard / Queen Elizabeth Forest Park	160,496	123,585	36,910
Regional Facility			
Mabie	25,341	11,988	13,352
Ae	27,885	10,926	16,959
Laggan Wolftrax	20,946	1,531	19,416
Craigvinean	35,339	22,026	13,313
Cycle Crinan	13,857	1,704	12,153
Arran	8,513	3,599	4,914
Brecklett	10,980	1,589	9,391
Pitfichie	15,537	7,502	8,035
Dunrobin Estate / Golspie	6,041	2,795	3,248
Community Facility			
Kirroughtree	23,579	5,097	18,482
Kirkhill	31,255	25,489	5,766
Fochabers	12,589	7,877	4,712
Dalbeattie	14,684	5,766	8,917
Learnie	13,320	5,885	7,435
Carron Valley	48,172	38,177	9,995
Ardgartan	17,533	6,960	10,629
Blairadam	46,459	37,142	9,317
Glen Affric	2,022	185	1,837
Glen Urquhart / Balnain	7,117	2,818	4,299
Newcastleton	11,950	5,152	6,798
Glentool	8,028	1,797	6,231
Dunoon	8,376	6,538	1,837
Balblair / Carbisdale	3,817	1,617	2,200
Balmacara / Kyleakin	3,871	407	3,464
Inchnacardoch	5,463	1,264	4,199
Mull	2,815	171	2,644
Glen Garry	Not calculated		
Glen Righ	Not calculated		
Barcaldine	3,908	850	3,058
Glen Nevis	5,390	247	5,144
Fauldhouse	16,923	14,401	2,521
Rumster	2,021	1,517	504
Rosehall	808	395	413
Morven	832	115	717
Fearnoch	4,499	424	4,075
Carradale	1,435	396	1,039
Sunart Oakwoods	536	20	516
Borgie	467	215	252
Morangie	Not calculated		
Glenbranter	4,118	473	3,646

APPENDIX III

Key Purpose-Built / Single Track Models

KEY PURPOSE-BUILT / SINGLE TRACK MODELS

In this Appendix TRC pinpoint key development sites and examine them in more detail re best practice product development and market demand trends. The best practice models / sites examined are as follows:

1. Glentress
2. Kirroughtree
3. Laggan Wolftrax
4. Coed-y-Brenin

GLENTRESS – A BEST PRACTICE MODEL	
Elements of Success	Description
Product	<ul style="list-style-type: none"> The world-renowned Glentress, is a mecca of the sport and is the recognised best mountain biking facility in the UK; It has five recognised loops as well as many integral freeride areas, skills' loops, and Trailquest. It caters for all markets offering easy graded green trails through to black severe graded trails. Includes the Helly Hansen V Trail Glentress' signature trail.
Market	<ul style="list-style-type: none"> Glentress already has a very good reputation and was voted the best Mountain Biking Centre 2004 (Singletrack); Attracts upwards of 3,000 mountain bikers per week; Attracts / targets all types of markets from novice through to experienced; Recognised by the market as the 'Number 1' place to mountain bike in the UK; Year-round demand from a mix of markets including older couples, women, etc for a range of recreational activities; Has formed a Saturday morning Children's Club and offers skills tuition, guided rides.
Wider Product Facilities	<ul style="list-style-type: none"> Glentress is also home to the award winning Hub Café re food and drink, now a separate brand 'The Hub in the Forest'; Bike hire, bike wash, bike service facilities all provided; Has three car park facilities offering alternative starting points; There is also a dedicated cycle ranger of Glentress who concentrates on trail management and maintenance.
Unique Selling Point	<ul style="list-style-type: none"> Initially it was the Helly Hanson V signature Trail however today Glentress is <i>'the'</i> destination with its wide variety of products as well as the excellent service facilities on offer; The Glentress product and the experience it offers is the envy of other facilities; Glentress / Tweed Valley will be the location for Scotland's Cycle academies – focusing on downhill and cross-country disciplines.
Destination Factor	<ul style="list-style-type: none"> Glentress is situated in the heart of the Borders but is only 40 minutes away from Edinburgh; Located one mile outside the town of Peebles there is lots to see and do – good alternative recreational facilities, food, drink and tourist provisions on offer; Tweed Valley has fabulous scenery and some excellent visitor attractions and generally a good tourism product; Lots of pubs, B&Bs and campsites nearby as well as an abundance of four and five star hotel accommodation.
Development Plans	<ul style="list-style-type: none"> Funding for Phase II of the development has only recently been secured. The main focus of Phase II will be to widen the sport to newcomers, families and community groups; Plan to spend £71,000 at Glentress on trail extensions; To attract people to the sport who have never tried or attempted it before; Facilitate outreach programmes with community / disabled groups; A volunteer bike patrol system is being considered which will focus on the visitor welcome, safety and trail management; Glentress will continue to develop to ensure it maintains its position as the number one mountain biking facility in the UK; A larger permanent central facility is proposed (the Hub is now over capacity) – a private building in twelve acres of land adjacent to Glentress has just been purchased for this purpose and will be converted, but only after market consultation; The new central facilities will cater for all market needs – redressing the balance towards walkers and other recreation users. This facility will open in 2007.
Future Opportunities	<ul style="list-style-type: none"> To attract a wider market – grow the sport link to wider recreation, forest use; Enhance product value / brand recognition; Begin to develop an overseas market – on the back of Glentress' potential as a niche mountain bike resort (valuing forest recreation); Continue to work with local businesses and VisitScotland to maximise destination linkages; Strengthen the product – continue to maintain and improve quality.

KIRROUGHTREE – A BEST PRACTICE MODEL	
Elements of Success	Description
Product	<ul style="list-style-type: none"> • One of eight purpose-built mountain bike sites situated in Southern Scotland; • Provides a biking product which caters for families through to experts; • Products range from family-friendly trails to top technical challenges; • Has four main routes, two (blue and green routes) targeting novices, children and families whilst the red and black trails are best tackled by intermediates and enthusiasts.
Market	<ul style="list-style-type: none"> • Attracts an estimated 33,000 cyclists per annum; • Kirroughtree has been developed as a family facility which aims to cater for novices / children / families as well as the more experienced mountain biker ie black crags, black loop – severe gradients. The McMoab feature has become the signature of black trail.
Wider Product Facilities	<ul style="list-style-type: none"> • Kirroughtree is firstly a family facility and cyclists share facilities with other users. Not only is it a cycling facility, but also includes a play park, visitor centre, fishing, camping, food outlet and education / outsourcing programmes for schools and community groups; • Kirroughtree is a popular forest with other users ie walkers – other markets have not to be excluded due to cycling. Mountain biking has been built around other market needs a fully integrated forest development.
Unique Selling Point	<ul style="list-style-type: none"> • With lots to see and do at Kirroughtree there is no doubt it is an ideal family cycle / forest recreation facility; • It offers a 'rounded' product offering and it is this which makes Kirroughtree an attractive visitor cycling destination; • The level and range of trails at Kirroughtree are well known and it has an excellent brand image throughout the marketplace re cycle reviews / magazine critiques.
Destination Factor	<ul style="list-style-type: none"> • Situated three miles from Newton Stewart where there is food and drink, retail and accommodation premises readily available; • The Kirroughtree product is continuing to evolve and grow; • A flexible offering together with family-friendly trails ensures an enjoyable fun-filled experience is had by all at Kirroughtree; • Positioned as a key destination within the 7stanes umbrella brand; • The central facilities and style of flowing cross-country trails are the real cycle visitor draw to this venue.
Development Plans	<ul style="list-style-type: none"> • As part of 7stanes Phase II Kirroughtree management hopes to increase trail lengths as well as carry out improvements to signage, marketing and interpretation etc; • Introduce improved green trail off public road; • Improve / extend black trail – limit forest road sections; • Improve blue and red trail / network approach.
Future Opportunities	<ul style="list-style-type: none"> • There is no doubting the differentiation of the Kirroughtree cycling product. It has the opportunity to continue to achieve quality media coverage / market appraisal and grow the number of overnight visitors staying in the surrounding area.

LAGGAN WOLFTRAX – A BEST PRACTICE MODEL	
Elements of Success	Description
Product	<ul style="list-style-type: none"> • Laggan Wolftrax is a recent addition to the FCS off-road cycle provisions (December 2004); • Uplift facility provided by BaseCamp MTB via transit van (on an ad hoc basis); • Has nearly 18km of trail ranging from the 3.2km blue grade fun park to the extremely difficult double black grade 6km, route through to the 6.6km red grade trail for intermediate riders (however if uplift is utilised trail lengths reduce by 1-2km).
Market	<ul style="list-style-type: none"> • Before these recent developments, there was no cycling in the forest; • Usage numbers recorded to date will equate to 30,000 visits / riders in its first year of operation; • Anecdotally the market is very pleased with the product which is being used heavily as short, half-day entertainment provision; • Laggan Wolftrax pulls day visitors from Aviemore and also complements the World Cup Downhill track at Nevis Range; • Caters for intermediate markets as well as the experienced market; • Market very appreciative of uplift provision allowing 'session' riding of red and fun park routes; • The lack of easier dedicated downhill facilities in Scotland has been to the advantage of Laggan Wolftrax. Laggan Wolftrax now attracts a high proportion of users with 'big hit' bikes.
Wider Product Facilities	<ul style="list-style-type: none"> • BaseCamp MTB is a friendly bike shop and café located at the bottom of Laggan Wolftrax. It includes cycle hire, a spares and repairs shop, café, showers, toilets and bike wash; • Community is highly involvement in the forest development. Includes the promotion of events, as well as walking, horseriding and wildlife enjoyment; • A pony trekking business operates seasonally from Laggan.
Unique Selling Point	<ul style="list-style-type: none"> • Short, sharp adrenaline-pumping rides; • Niche product – unlike no other in Scotland; • Uplift is very popular and effective opportunity for trail / fun park sessions; • Very popular for youth / emerging markets; • Short, half-day entertainment value.
Destination Factor	<ul style="list-style-type: none"> • Recognised high octane adventure product – could attract similar markets to white-water rafting / kayaking / surfing etc; • If wider links can be promoted to Aviemore or Fort William, Laggan Wolftrax offers appeal as an overnight destination opportunity re weekend of cycling or indeed alternative tourism / recreation provisions ie food / drink and accommodation.
Development Plans	<ul style="list-style-type: none"> • Aspirations to develop a larger red loop helping to extend visitor stays; • Phase II developments will be based upon the market success of Phase I and the appetite of the local community and partners for a Phase II development; • Build on freeride opportunities / skills and complement to Witch's Trails and World Cup Downhill, Nevis Range.
Future Opportunities	<ul style="list-style-type: none"> • Consideration to entry level routes to become an integral part of the single track product offering in the Highlands of Scotland; • Benefit fully from links to Fort William, Inverness and the value of being linked to the Cairngorms National Park; • With Lochaber Outdoor Capital and National Park credentials grow into a recognised overnight visitor destination for mountain biking.

COED-Y-BRENIN – A BEST PRACTICE MODEL	
Elements of Success	Description
Product	<ul style="list-style-type: none"> • Coed-y-Brenin is home to an ever increasing number of world-class single track mountain bike trails. It is truly a mecca for the mountain bike fraternity; • Coed-y-Brenin has been an established single track mountain bike destination for over a decade. It was the first of its kind in Western Europe; • The Coed-y-Brenin product is mainly targeted at the experienced end of the market. At present only the Fun Run is appropriate for the November rider; • Construction of a new visitor centre and the central facilities for mountain biking ongoing; • Has five single track trails totalling over 100km; • Includes the world-famous Red Bull Trail.
Market	<ul style="list-style-type: none"> • Majority of trails target experienced riders. All literature stipulates that only the Fun Park be ridden by novice market segments; • Attracts between 40,000-60,000 visitors per annum; • Significant proportion of market is overnight. Coed-y-Brenin has an excellent reputation, a three-pronged trail system in place and is an excellent weekend cycling destination; • Currently substantial reinvestment going into Coed-y-Brenin – on the back of this Forestry Commission Wales anticipates attracting over 100,000 cyclists.
Wider Product Facilities	<ul style="list-style-type: none"> • The new £1.6m state of the art visitor centre will form the 'backbone' of Coed-y-Brenin's wide product offering. Will be the focal point of the forest park. Shop / hire and repair as well as retail / café facilities will be offered; • The forest has a number of walking trails as well as plenty of riverside / picnic sites.
Unique Selling Point	<ul style="list-style-type: none"> • The forest park is suitable for all groups and is a very popular family destination of North Wales; • It is hoped Coed-y-Brenin visitor centre will act as the catalyst for growth in the numbers of cyclists; • Coed-y-Brenin, the brand, cannot be underestimated, it was the first single track, purpose-built cycling experience in the UK. This is a significant selling factor for all cyclists.
Destination Factor	<ul style="list-style-type: none"> • Continues to attract significant proportion of overnight visitor. Is a recognised weekend cycling destination; • Good local service support re traditional pubs / cafés and accommodation in the area which fits with the cycling markets expectations; • Coed-y-Brenin cycling has significant economic impact on the local area.
Development Plans	<ul style="list-style-type: none"> • Upgrading and refreshing single track trail system; • Significant financial reinvestment in trails; • Attract wider market segments ie novice / intermediate markets; • Ensure trail sustainability and health and safety requirements.
Future Opportunities	<ul style="list-style-type: none"> • Aspire to again become the number one mountain biking destination of the UK.

APPENDIX IV

Freestyle Cycling

FREESTYLE CYCLING

Freestyle is a type of cycling that encompasses sport and leisure riders. The sport evolved out of the USA and is closely affiliated with BMX. During the 1980s and early 1990s manufacturing freestyle frames appeared on the market. It is now estimated that about 5% of BMX racers also participate in freestyle cycling. Freestyling includes dirt jumping and street.

Dirt jumping is where there are two or more huge jumps and riders try and do as many tricks over them as possible. The sport is another of the BMX derived disciplines.

Trail jumping is the terminology used to describe a collection of dirt jumps. Trail riders are 'adrenaline-seeking junkies' who spend most of their time in forest / woods building more jumps and more trail networks. It is an exciting but very technical sport predominately associated with 12-22 year old male youths. It is all about style and 'pulling tricks' whilst in the air – many similar to the original BMX-type thrill.

Dirt bikes are generally heavier than race bikes but lighter than street bikes. A dirt bike will usually have no pegs and may not have a gyro. They have smaller frames than a BMX and 24-inch wheels and single speed and single rear brake.

Street stunts are performed while jumping over boxes, rails and pipes on a skateboard-like street layout.

There are no general statistics in terms of the quantification of the numbers of people riding freestyle in the UK. New developments in Wales and Northern Scotland ie Balnain are testament however to the growth and popularity of the sport.

APPENDIX V

Estate Diversification Opportunities and Developments

ESTATE DIVERSIFICATION OPPORTUNITIES AND DEVELOPMENTS

In this Appendix consultants highlight a number of private estate holdings where opportunities for private mountain bike development exist. In some cases these possibilities are only anecdotal aspirations, however they must be considered seriously as possible future additions to the purpose-built single track product provision in Scotland.

The five considered to have serious opportunity for development are as follows:

- 1 Blair Atholl Estate
- 2 Invercauld Estate
- 3 Drumlanrig Estate
- 4 Dunrobin Estate
- 5 Glencoe Ski / Mountain Resort

1 Blair Atholl Estate

The village of Blair Atholl with an integral alignment to the Blair Atholl Estate has an opportunity to develop an off-road mountain bike facility to cater for an independent and group outdoor activity markets. This could then be linked into an orientation / service centre for outdoor / activity 'type' target markets. At this stage these proposals are merely anecdotal. There are also opportunities to link existing accommodation provisions ie caravan parks to fun and freeride trails (but these would have to be purpose-built and private sector investment could be unlikely).

Currently Blair Atholl Estate produce a leaflet / map for cyclists showing the network of estate trails. They have four routes, each graded separately and targeting markets from novice through to experienced. Routes are on existing tracks, paths and trails – no purpose-built facilities have been added. Blair Atholl is also part of the National Cycle Network Sustrans Route 7.

Blair Atholl is already recognised as a cycling / outdoor activity destination. If an off-road / single track development was forthcoming then it would certainly have an impact in the market. However, this is unlikely due to lack of commercial return.

2 Invercauld Estate

The Estate is considering the expansion of activities and increasing the commercial opportunities of the Estate. Mountain biking is a recognised recreational activity and the Estate has signed existing cycle tracks / trails / routes, etc. However, the development of purpose-built single track is unlikely, this commercial opportunity is offset by significant capital costs required to develop / construct cycling provisions. Further, competition from mountain biking facilities closer to centres of population would have an impact on any purpose-built mountain bike development in Invercauld Estate. Land for Glenshee ski slope is leased from the Invercauld Estate. The ski slope would like to consider downhill mountain bike routes, but due to lucrative stalking activity this is unlikely.

Although consultation is ongoing TRC consultants assume a cycle development on Invercauld Estate to be unlikely. The development of a very positive attitude to recreation on a private estate, car parking, maps, toilet provision, information is extremely refreshing.

3 Drumlanrig Estate

Drumlanrig Estate is an already recognised cycling destination. It includes classic woodland single track through some of Scotland's finest Lowlands scenery. There are three waymarked trails and a host of options to explore. It caters for all markets from novice through to experienced. Rick Alsop has moved from Mabie Forest (Riks Bike Shed) to set up and advise at Drumlanrig Estate.

'Cycle Drumlanrig' is fast becoming one of the United Kingdom's premier venues for cross-country racing and it already hosts British and Scottish National cycle events.

Drumlanrig is a key visitor destination with lots to see and do. It includes visitor centre, walking, tree trail, activity play, in addition to cycling trails, bike hire / repair and café facilities. Drumlanrig trails are an excellent private / commercial product and as a cycling destination a complementary facility to FCS' provisions.

4 Dunrobin Estate

The village of Golspie is set within the boundaries of Dunrobin Estate and is better known for its links to the Castle Dunrobin, home of the Earls of Sutherland.

A four stage 30km single track cycle development has been agreed with the Estate owners and completion of the trails is envisaged in early 2006. This is a £300,000 development being driven by the Golspie community. A user agreement with the Dunrobin Estate has been secured. This is a public / private partnership and will include funding from FCS.

Trails will include blue and red loops, a skills park and a black downhill trail. It is expected that this single track facility will be the focus for mountain biking in the very North of Scotland.

5 Glencoe Ski / Mountain Resort

Scotland's first commercial mountain resort is situated on the A82, 26 miles South of Fort William and 23 miles North of Crianlarich and, importantly, only 74 miles or 1½ hours drive time from Glasgow – Scotland's largest centre of population.

The Glencoe Company has plans to develop an all-year downhill mountain biking facility. At this stage these proposals are merely aspirational. However if funding could be secured and market feasibility confirmed a development in the future could materialise.

A temporary downhill trail is being developed for the Scottish Downhill Association Series taking place in summer 2006. This will be a naturally developed trail. Organisers expect 250 downhill participants.

APPENDIX VI

Other UK Forest Mountain Bike Developments

OTHER UK FOREST MOUNTAIN BIKE DEVELOPMENTS

1 Mountain Bike – North of England

There are currently five forest areas in the North of England that have aspirations to develop single track mountain bike facilities. The five forests are all at differing development stages – in some cases planning and funding issues are constraining development proposals. It is important that FCS is aware of the North of England forestry aspirations and development plans as potentially it could have an impact on Southern Scotland / overnight visitor demand.

A synopsis of development plans at each of the five forestry areas is as follows:

Hamsterley (Teesdale)

- In early 2005 the go-ahead was given for the biggest proposed mountain bike trail project in Northern England. Funding for Phase I of the project exceeded £200,000 and included the Forestry Commission, bike clubs and other funding partners;
- Phase I of the project is now nearing completion and includes the development of a 'state of the art' skills area and off-road links between Hamsterley Visitor Centre and the [REDACTED] end of the forest. This link development is green graded and separates cyclists from walkers while offering safety and security to young children, families and beginners;
- The skills area is where riders of all abilities will have the opportunity to develop their proficiency. Blue, red and black graded options for riders are available and the skills area is appropriate for session cycling (back and forth over the same obstacle);
- The cost of developing Phase I per km has been very expensive;
- The project partnership aim to raise a further £2 million to get Phase II underway and is considerable due to poor ground conditions. Their aspirations to develop over 50km of red and black routes at the [REDACTED] end of the forest – a very ambitious project;
- The partnership believes that Hamsterley can become an international venue for mountain biking in the not too distant future if all development proposals are realised;

- Prior to the 2005 developments there were unsustainable trail facilities at Hamsterley. However, it is now believed that these new developments will widen the product offering of Hamsterley as well attract a whole new market of mountain bikers to the sport and coincidentally increase the critical mass of users to Hamsterley Forest;
- Phase I of the project was designed by Mountain Bike Specialist design consultant Pete Laing;
- The Hamsterley developments are based around the Glentress model;
- The development group is optimistic about the future success and opportunity for Hamsterley as a mountain biking destination;
- There is an existing visitor centre, replacement of this will be considered in future.

Grizedale (Lake District)

- Grizedale Forest Park provides a great day out for all levels of cyclist. It is already recognised as a family / cycling destination;
- It offers five waymarked cycle trails and caters for all types of markets from easy graded trails through to demanding, longer harder routes;
- The North Face purpose-built single track trail was opened in September 2005. This is a 10km red loop aimed at the intermediate market. This new single track development includes climbs, downhill sections, 'North Shore' and steep technical terrain;
- The new trail was funded by the well-known outdoor company / brand 'The North Face' in conjunction with the Cumbria Rural Regeneration Fund;
- Designed by the Welsh Trail Designers responsible for the Afan Forest trail network;
- Initial trail cost is an estimated £167,000;
- Grizedale Forest already attracts 200,000 visitors per year of which an estimated 25% are cyclists / mountain bikers. It is expected that cycle usage will rise considerably as a result of these new developments;
- Grizedale is a recognised destination within the Lake District;
- One of the objectives of the cycling improvements is to attract more family and overnight visitors to the area;
- Cycling is an ideal activity to augment other recreation products offered in the forest ie Go-Ape, walking etc.

Whinlatter (Cumbria)

- This proposed development is on a vast scale. The aim is to construct a 70km network of routes and loops, each with a different level of difficulty ie would target all types / level of user;
- The proposed development of Whinlatter as a key purpose-built mountain bike facility has been ongoing for sometime. A feasibility study published in 2003 estimated that Whinlatter would attract 54,000 riders per annum and be worth £1.3 million to the local economy;
- Aim of Whinlatter development is to turn the forest into a mountain biking haven to rival existing world-class purpose-built single track routes in Scotland and Wales – its main benchmark has been Glentress;
- Whinlatter management believe that if a product is developed they would have an opportunity to target existing customers at Glentress and across the 7stanes area;
- Plans for a £3.5 million mountain bike facility in Whinlatter Forest were first submitted to the Lake District National Park Authority in mid 2004, however planning consent, as yet, has not been granted for this development.
- National Park issues / concerns are the main stumbling block to the development. They are concerned about increases to visitor numbers within the National Park and having vast increases in traffic flow through a small key village.

Kielder (Northumberland)

Northumberland is often overlooked as a mountain biking destination. More popular areas such as the Lake and the Peak Districts tend to get a lot more attention. Northumberland however, has a good tradition of club road cycling on its many rural lanes. There is also a network of Sustrans and local loop routes. However, irrespective of the wider impression Kielder Forest offers routes for cyclists / mountain bikers of all ages and abilities and it is widely recognised to be one of the best known facilities within the mountain bike fraternity in the UK. However, many of the trails are on forest roads (currently) through monotonous conifer plantations;

- There are 15 trails each from easy to demanding in gradient / skill level;
- It includes a cross-border trail between Kielder and Newcastleton;

- Development involves rebuilding all 15 mountain bike trails to the design, construction and quality standards being set by 7stanes and Mountain Bike Wales. This proposal will involve the constructing of a large network of interlinking trails. It is hoped to link the Kielder network with the Newcastleton 7stanes site;
- The project will be very much based around whole family participation / enjoyment;
- This project does not have planning permission and could take anything from three to eight years to achieve;
- The masterplan development has stalled due to lack of planning consent difficulties. The Kielder Partnership is continuing to work towards planning permission, however as a result, there has been a change of emphasis by the regional Forestry Commission and Hamsterley is now being pursued as the area's main cycling facility.

Dalby (North Yorkshire)

- Dalby Forest lies in the South-Eastern corner of the North Yorks Moors National Park area. It has become a popular place for all the family as well as providing a varied wildlife habitat and producing valuable timber;
- The Forest has traditionally provided cycling trails to cater for the local demand. However, over the years the trails have deteriorated and are now considered unsafe and now unsustainable for cycling;
- Forestry Commission management have taken the strategic decision on the back of poor existing trails and evident growth in the sport to begin to construct 50km of single track trail through the Forest;
- Trails will generally be at a novice / intermediate grade (blue and red) and target all cycling skill levels. It will link / be serviced by Dalby Forest's visitor centre facilities;
- The catalyst for development was an approach from a local bike club and bike manufacturer. The development project is now part of a wider funding partnership with cost overall, around £400,000.

2 Mountain Bike – Northern Ireland

Northern Ireland opened its first purpose-built mountain bike trail in Craigavon in September 2005. This 10km trail is the first to be designed within a city park in the United Kingdom and features 7km of narrow purpose-built single track trail with an earth or stone surface. The trail was designed by Dafydd Davis.

Northern Ireland has plans in place which would see it become a world-renowned off-road cycling destination. Three more cycling trails are planned for 2005, and a further 24 trails are planned for sites throughout Northern Ireland (depending on funding requirements / sources).

The Local Authorities realise the health benefits of increased cycle usage but also the benefit of cycling to the future economy of Northern Ireland in terms of tourism and the environment. Local Authorities throughout the province are working in partnership with the main landowner, Forest Service, a government body.

In 2004, 12 million pounds of funding for development of local trails in Northern Ireland were withdrawn by the Forest Services because of upkeep / maintenance. International Mountain Bike Association (IMBA) recently rated Northern Ireland poor in terms of product provisions. Before Northern Ireland, as a cycling destination, can realise its objectives, funding and operational issues with the major landowner Forest Services still have to be fully resolved.

APPENDIX VII

North America Mountain Bike Developments

NORTH AMERICA MOUNTAIN BIKE DEVELOPMENTS

US mountain biking is split into two distinct markets. Either they are people looking for a trail ride, fitness endurance over a challenging terrain features – these tend to be for fitter, older people, or what is becoming ever more popular is freeride and downhill for people under the age of 25, where ski resort chairlifts are used for mountain bike uplift during the summer months. The majority of trails are owned by the US National Trust, Bureau of Land Management (BLM), Army Corps of Engineers, State Partners, Country Parks and private landowners. However, almost all of the very successful trails are built in coordination with IMBA and associated membership clubs. The US has 400 IMBA clubs who help build, develop and maintain trails.

These clubs form ‘partnerships’ with landowners to ensure that the quality of trails constructed is high. The majority of these clubs are volunteers. IMBA is promoting this model of mountain bike trail development throughout the US. They see these ‘multi-user coalitions’ as the most appropriate way to deliver these trails. Quality is controlled by adopting IMBA design guidelines.

In terms of product marketing, it seems many of the trails on public land have organically grown / been extended and refreshed over the years. For example, the mountain bikers just started coming because of the area’s scenic beauty and the trail infrastructure would then organically grow around this. Mountain bike development was not a planned and coordinated development initiative.

Additional information on some of North America’s most popular areas is detailed below.

Moab (Utah)

Moab, a small town located in South-Eastern Utah, has over 20 mountain biking trails. It has developed world-class reputation from Moab’s famous Slickrock trails and is fast becoming known (internationally) for its mountain bike and access facilities. The region offers a variety of trails, diverse terrain and scenery to make this a destination of significant mountain biking importance.

Research directed TRC to numerous economic impacts of mountain biking in Utah. Main points of note include:

- The average value per mountain bike trip was estimated at \$197-\$205;
- there are currently problems with trail overcrowding / visitor management eg shared with hikers and equestrians;
- negative effects on the environment.

Moab was initially built from jeep and mining roads. However, such is the destination's popularity and in order to stay on top of the market / attract demand, the region is now being seen to add a network of single track trails to ensure its position as a key mountain bike destination is maintained in future.

Fruita

- First developed in the early 1980s by a mixture of locals and volunteers. Fruita in Colorado now boasts some of the best single track trails in the US. It consists of over 1,000 miles of track over one of the World's highest desert plateaus;
- Although Fruita is not as well known as Moab (Utah), it does offer some excellent riding opportunities. Indeed the Fruita Fat Tire Festival is said to pump \$1.5 million into the local economy;
- The Bureau of Land Management (BLM) plan to govern the use of recreational trails in Fruita. They plan to restrict mountain bike usage to specific areas. IMBA have grave concerns that this change of policy could have a negative impact on mountain bike users in the area and impact negatively on Fruita as a world-class mountain bike destination.

Whistler Blackcomb

Whistler Blackcomb, British Columbia, Canada is one of the most extensive and modern ski resorts in the World. Historically Whistler and Blackcomb were two adjacent but separate ski mountains, each with its own base villages. Since 1997 both resorts and the mountains have been owned by the conglomerate Intrawest who have invested millions of US dollars in the resort.

Essentially the resort promotes winter skiing, but summer activities have become increasingly popular. One of the most popular summer activities at the resort is Whistler Mountain Bike Park. Summer activities are said to now generate more than 75% of the winter revenues.

Whistler Mountain Bike Park boasts 200km, 34 trails of lift-serviced gravity-fed, adrenaline-fuelled routes, but there is still something for all riders. All trails are graded from green, blue, black to double black. There is also a biker cross-country dirt jumping.

The resort offers a range of daily tours, tuition, bike camps and events aimed at all levels of ability, children, women etc.

The resort also has a large number of graded long and short distance cross-country routes (but these are not as well promoted as the Bike Park), gentle cycles in the valley bottom along the rivers edge or by the lake, hidden trails and short mountain bike skill trails.

The resort appeals to all: the armour-clad downhill freerider; cross-country endurance hard man; the family – kids and granny; the day visitor from Vancouver or across the border in Seattle; the short break tourist; the biking enthusiast.

Each year the resort hosts a number of high profile, regional, commercial events which are well supported by sponsors such as: Oakley, Kona, IMG, Crankworx etc.

In 2001, Whistler was due to hold the World Cup Downhill, Cross-Country and Dual Slalom event, but it was cancelled in 2000 by the resort management committee on the grounds of too high a commercial risk. It could impact negatively on their already high level of demand.

The network of bike trails at Whistler are continually being refreshed and expanding. In 2004 a new chairlift will provide access to three new trails. The first trail to open will be expert level route in July 2004 followed by the development of intermediate trails over the summer.

Visitor numbers to the Whistler Bike Park have increased by 500% in five years and this has prompted new trail development. The new trails will ensure that lift capacity doubles, reducing queues. There is an additional 2,200 feet of vertical terrain and the Mountain Bike Park is set to grow by 200%, giving endless future development opportunities. Whistler resort sets the standard for lift-serviced mountain biking in the World.

Whistler is definitely on a different scale to the 7stanes project. However, it is the network of downhill, cross-country and valley trails which are ever developing and evolving which is of relevance. This has created an appeal to a very wide range of markets and also creates a significant number of repeat visits, the visitor experience, quality of product and service being second to none and ever-changing.

To keep the quality of the trails high, some key high-use trails are rebuilt every season, others are retired and alternative routes created.

APPENDIX VIII

Urban 'Type' Cycle Developments / Campaigns

URBAN 'TYPE' CYCLE DEVELOPMENTS / CAMPAIGNS

As purpose-built facilities have continued to expand so has there been a movement towards cycling facilities within urban woodlands. In this Appendix TRC briefly highlights some key developments within urban area / woodlands, country parks etc.

1 Bellahouston Park

The Glasgow Mountain Bike circuit is located in Pollok Country Park and gives the rider a 'real' mountain bike experience within the City. There are three individual circuits for riders of different skill levels. The green provides an ideal introduction to the novice market, the blue is a first step in steep terrain with varied surfaces and some 'air' and the red route gives the rider a taste of the terrain to be expected in mountainous conditions.

The cycle routes are easily accessible via Sustrans Route 7 and 75 of the National Cycle Network. The mountain bike circuits also have accredited trainers readily available to cyclists. This facility is linked to the Scottish Cycling academy at the Park. They can deliver a range of training from basic control skills through to on-road journey planning or introductory mountain biking. The academy also promotes the disciplines of on-road and velodrome track cycling at performance level.

The facilities at Pollok Country Park are an ideal urban provision and help satisfy the needs of the local area. It is also a facility which can help to ameliorate health and social problems facing Glasgow.

2 Kingdom of Fife Millennium Cycleways

By 2002, over 500km of new safe and signed cycle routes were completed. The routes have been developed for recreation and commuter cycling with all ages and abilities of cyclist being suitably accommodated. The terrain varies from off-road disused railway tracks to routes in forests and from networks in towns to networks along quiet country lanes.

Over £3.7 million of funding has been secured for this four-year project which includes physical infrastructure improvements, route signposting, junction marking, interpretative and information boards.

The Kingdom of Fife benchmark is a good example of government bodies working together to provide facilities for, but also grow, the sport of cycling. Although most of the developments are not 'off-road' it is an example of effective and productive means of promoting and raising cycling's profile. Some of the Fife Millennium Cycleways cross FCS land (see Blairadam).

3 Try Cycling Edinburgh

This is a recently formed organisation set up to campaign and encourage more people to ride bicycles in Edinburgh. It is being supported by all cycling organisations ie Spokes, CTC, Sustrans and Cycling Scotland. It aims to raise awareness and generate increased demand for cycling. It works in conjunction with the local Edinburgh Councils and the Executive / Government / agencies to actively promote cycling as a sustainable transport mode.

APPENDIX IX

Project Prioritisation Tables

Consultant's Project Scoring Mechanism, Strategic Fit With National Strategy – 7stanes

Potential Development Opportunity	Tweed, Glentress & Innerleithen	Ae *	Mabie *	Dalbeattie *	Kirroughtree	Glentroot	Newcastleton
Strategic Positioning	National	Regional	Regional	Community	Community	Community	Community
Criteria							
Number of visitors	5	4	4	3	3	1	3
Access for all – widen market base	4	4	4	3	4	2	3
Maximise use of forest as a recreational resource – links to other forms of recreation	4	4	4	3	4	3	3
Economic benefit – overnight potential / destination links	5	4	4	3	3	1	2
Improve health, wellbeing and social inclusion credentials	3	3	4	3	3	2	3
Ability to build critical mass / world-class credentials	5	3	3	3	3	2	3
Profile – build and maintain FCS cycle profile	5	4	4	4	4	2	3
Partnership potential	5	3	3	4	4	3	3
Ease of achievement	5	3	4	4	4	4	4
TOTALS	41	32	34	30	32	20	27

Project Development Summary

Potential Development Opportunity	Tweed, Glentress & Innerleithen	Ae *	Mabie *	Dalbeattie *	Kirroughtree	Glentroot	Newcastleton
Strategic Positioning	National	Regional	Regional	Community	Community	Community	Community
Development Priority							
Essential	✓				✓		
Desirable		✓	✓	✓			
Nice to have						✓	✓
Do not develop or only develop if part of wider recreation offer or strategic link							

* Full regional focus is the cluster effect of Mabie, Ae, Dalbeattie to maximise market opportunity, widen the market base and optimise economic benefit.

**Consultant's Project Scoring Mechanism,
Strategic Fit With National Strategy – Tayside and Grampian**

	Craigvinean	Kirkhill	Pitfichie	Fochabers
Potential Development Opportunity				
Strategic Positioning	Regional	Community	Regional	Community
Criteria				
Number of visitors	4	4	3	3
Access for all – widen market base	3	3	3	3
Maximise use of forest as a recreational resource – links to other forms of recreation	4	4	3	3
Economic benefit – overnight potential / destination links	4	2	4	2
Improve health, wellbeing and social inclusion credentials	3	5	2	4
Ability to build critical mass / world-class credentials	4	2	3	2
Profile – build and maintain FCS cycle profile	3	2	3	1
Partnership potential	4	4	3	4
Ease of achievement	3	4	3	5
TOTALS	32	30	27	27

Project Development Summary

	Craigvinean	Kirkhill	Pitfichie	Fochabers
Potential Development Opportunity				
Strategic Positioning	Regional	Community	Regional	Community
Development Priority				
Essential		✓		
Desirable	✓			✓
Nice to have			✓	
Do not develop or only develop if part of wider recreation offer or strategic link				

Consultant's Project Scoring Mechanism, Strategic Fit With National Strategy – West and Central Scotland

Potential Development Opportunity	QEFP	Ardgartan	Glenbranter	Dunoon *	Fearnoch	Barcaldine	Brecklett **	Carradale	Cycle Crinan	Blairadam	Carron Valley	Arran ***	Fauldhouse
Strategic Positioning	National	Community	Community	Community	Community	Community	Regional	Community	Regional	Community	Community	Regional	Community
Criteria													
Number of visitors	5	3	1	2	1	1	3	1	3	4	4	2	1
Access for all – widen market base	5	3	2	2	2	3	3	2	4	3	4	3	3
Maximise use of forest as a recreational resource – links to other forms of recreation	5	4	3	2	3	3	3	3	3	3	3	4	2
Economic benefit – overnight potential / destination links	5	4	2	2	2	3	3	2	4	2	2	4	1
Improve health, wellbeing and social inclusion credentials	3	2	2	3	3	2	2	2	2	4	3	1	5
Ability to build critical mass / world-class credentials	5	3	1	2	1	2	4	1	3	2	2	4	1
Profile – build and maintain FCS cycle profile	5	3	1	1	1	2	3	1	3	2	2	4	1
Partnership potential	5	2	2	3	1	3	4	2	4	3	5	5	4
Ease of achievement	3	3	4	3	3	3	2	3	4	4	4	3	4
TOTALS	41	27	18	20	17	22	27	17	30	27	29	30	22

Project Development Summary

Potential Development Opportunity	QEFP	Ardgartan	Glenbranter	Dunoon *	Fearnoch	Barcaldine	Brecklett **	Carradale	Cycle Crinan	Blairadam	Carron Valley	Arran ***	Fauldhouse
Strategic Positioning	National	Community	Community	Community	Community	Community	Regional	Community	Regional	Community	Community	Regional	Community
Development Priority													
Essential	✓												
Desirable		✓							✓	✓	✓	✓	
Nice to have				✓		✓	✓						✓
Do not develop or only develop if part of wider recreation offer or strategic link			✓		✓	✓	✓	✓					

* Phase I assessed only – product could evolve with partnership and market aspirations in longer term, given access to markets re ferry links, etc.

** Longer-term opportunity, once forest road network built. Will only realise full regional potential with links to Lochaber Outdoor Capital and Oban visitor destination.

*** Small regional opportunity, captive tourism destination, with potential for off-road cycling facilities.

Consultant's Project Scoring Mechanism, Strategic Fit With National Strategy – Northern Forests

Potential Development Opportunity	Glen Nevis	Sunart Oakwoods	Leanachan *	Laggan Wolftrax	Learnie	Mull	Morven	Glen Urquhart / Balnain **	Glen Affric	Balmacara / Kyleakin	Inchmacardoch	Borgie	Dunrobin Estate / Golspie **	Balblair / Carbisdale	Rumster	Rosehall	Glen Garry	Glen Righ	Morangle
Strategic Positioning	Community	Community	National	Regional	Community	Community	Community	Community	Community	Community	Community	Community	Regional	Community	Community	Community	Community	Community	Community
Criteria																			
Number of visitors	2	1	4	3	3	1	1	2	1	1	2	1	2	1	1	1	1	1	1
Access for all – widen market base	2	1	4	3	3	2	1	2	2	2	2	1	3	2	2	2	2	2	2
Maximise use of forest as a recreational resource – links to other forms of recreation	3	2	4	3	2	2	2	3	3	3	3	2	3	3	3	3	3	3	2
Economic benefit – overnight potential / destination links	2	1	5	4	3	2	1	3	2	2	2	1	3	2	1	1	2	2	1
Improve health, wellbeing and social inclusion credentials	3	1	3	2	3	2	1	3	1	2	3	2	3	2	3	3	2	2	2
Ability to build critical mass / world-class credentials	3	1	5	4	3	2	1	4	3	2	2	1	3	2	1	1	3	3	1
Profile – build and maintain FCS cycle profile	3	1	5	4	4	2	1	4	3	2	3	1	2	2	2	2	2	2	2
Partnership potential	3	3	5	4	4	3	2	3	4	3	3	3	4	4	3	4	3	3	2
Ease of achievement	3	4	5	5	5	3	5	5	4	3	3	2	4	4	4	4	2	2	2
TOTALS	24	15	40	32	30	19	15	29	23	20	23	14	27	22	20	21	20	20	15

Project Development Summary

Potential Development Opportunity	Glen Nevis	Sunart Oakwoods	Leanachan *	Laggan Wolftrax	Learnie	Mull	Morven	Glen Urquhart / Balnain **	Glen Affric	Balmacara / Kyleakin	Inchmacardoch	Borgie	Dunrobin Estate / Golspie **	Balblair / Carbisdale	Rumster	Rosehall	Glen Garry	Glen Righ	Morangle
Strategic Positioning	Community	Community	National	Regional	Community	Community	Community	Community	Community	Community	Community	Community	Regional	Community	Community	Community	Community	Community	Community
Development Priority																			
Essential			✓																
Desirable				✓	✓			✓	✓										
Nice to have	✓					✓				✓	✓		✓	✓	✓	✓	✓	✓	
Do not develop or only develop if part of wider recreation offer or strategic link		✓					✓					✓							✓

* Includes potential of Leanachan for redeveloped Witch's Trails and as an International Event Facility.
 ** Balnain is a community facility but the specialist freeride product is of regional significance.
 *** Private sector development – FCS part-funded. Opportunities for Northern regional cluster with Balblair and Carbisdale.

APPENDIX X

Individual Forest Sites Strategic Positioning

INDIVIDUAL FOREST SITES STRATEGIC POSITIONING		
Strategic Positioning		Strategic Priority
National Facility	Tweed / Glentress / Innerleithen	Essential
	Leanachan	Essential
	Loch Ard / Queen Elizabeth Forest Park	Essential
Regional Facility	Mabie	Desirable
	Ae	Desirable
	Laggan Wolftrax	Desirable
	Craigvinean	Desirable
	Cycle Crinan	Desirable
	Arran	Desirable
	Brecklett	Nice to have
	Pitfichie	Nice to have
Community Facility	Kirroughtree	Essential
	Kirkhill	Essential
	Fochabers	Desirable
	Dalbeattie	Desirable
	Learnie	Desirable
	Carron Valley	Desirable
	Ardgartan	Desirable
	Blairadam	Desirable
	Glen Affric	Desirable
	Glen Urquhart / Balnain	Desirable
	Newcastleton	Nice to have
	Glentroof	Nice to have
	Dunoon	Nice to have
	Balblair / Carbisdale	Nice to have
	Balmacara / Kyleakin	Nice to have
	Inchnacardoch	Nice to have
	Mull	Nice to have
	Glen Garry	Nice to have
	Glen Righ	Nice to have
	Barcaldine	Nice to have
	Glen Nevis	Nice to have
	Fauldhouse	Nice to have
	Rumster	Nice to have
	Rosehall	Nice to have
	Morven	Only develop if part of wider recreation offer
	Fearnoch	Only develop if part of wider recreation offer
	Carradale	Only develop if part of wider recreation offer
	Sunart Oakwoods	Only develop if part of wider recreation offer
	Borgie	Only develop if part of wider recreation offer
	Morangie	Only develop if part of wider recreation offer
Glenbranter	Only develop if part of wider recreation offer	

APPENDIX XI

Cycling and Mountain Biking in Scotland Visitor Research 2005

CYCLING AND MOUNTAIN BIKING IN SCOTLAND

VISITOR RESEARCH 2005

VisitScotland, in conjunction with other public agencies (including FCS), commissioned research in 2005 into Scotland's visitor cycling market. The research was carried out in May to July 2005 amongst UK cycling consumers and the UK cycling industry. The main objectives of study were for the client group to gain a better understanding of the cycling and mountain biking market in Scotland. A finalised report has been compiled and an Executive Summary published.

Key findings taken from the Executive Summary are detailed in bullet point format below. It must be stressed that the Appendix summary is not particularly exhaustive and takes on board FCS' initial involvement in the approach to this research study and indeed the conclusions gathered.

Key market findings include:

- Amongst leisure cyclists the destination is the key driver. For Scotland there is a need to raise consideration of Scotland as a holiday destination which offers cycling as part of a package / experience;
- Amongst specialist cyclists the cycling is the most important driver of the holiday re promote Scotland as a top class cycling destination with a variety of new experiences / trails;
- Key priorities for visitor cyclists included the availability of scenery / environment, routes, trails and accommodation;
- Less important priorities for visitor cyclists included provision of other activities and manageability of the weather;
- Key gaps in the Scottish cycling product offering included:
 - Easy routes for casual leisure cyclists;
 - Difficult riding experiences for top end specialists;
 - Information / interpretation enhancement;
 - Infrastructure support (ie accommodation / public transport / food / drink).
- Key opportunities for visitor cycling in Scotland included:
 - Leisure markets – seeking casual experience;
 - Fair-weather breakers;
 - Older children;
 - Young independents.

APPENDIX XII

Indicative Capital Costs and Summary of Existing and Proposed Single Track Development

INDICATIVE CAPITAL COSTS AND COSTS PER VISITOR				
Forest Area	Strategic Positioning	Total Number of Visitors	Total Development Costs – Based on Market Opportunity	Development Cost Per Visitor £
Cowal & Trossachs				
Queen Elizabeth Forest Park	National	160,496	875,000	5.45
Ardgartan	Community	17,588	382,000	21.72
Glenbranter	Community	4,118	206,000	50.02
Dunoon	Community	8,376	20,000	2.39
Regional Total		190,578	1,483,000	7.78
Lorne				
Brecklett	Regional	10,980	593,000	54.01
Barcaldine	Community	3,908	95,000	24.31
Fearnoch	Community	4,499	42,500	9.45
Regional Total		19,387	730,500	37.68
Argyll				
Crinan	Regional	13,857	364,000	26.27
Carradale	Community	1,435	900	0.63
Regional Total		15,292	364,900	26.90
Lowlands				
Blairadam	Community	46,459	265,000	5.70
Carron Valley	Community	48,172	586,000	12.16
Fauldhouse	Community	16,923	170,000	10.05
Arran	Regional	8,513	161,500	18.97
Regional Total		120,067	1,182,500	9.85
7stanes Project Phase II – Trail Costs				
Kirroughtree	Community	23,579	61,250	2.60
Glentool	Community	8,028	141,250	17.59
Dalbeattie	Community	16,051	104,750	6.53
Ae	Regional	27,885	114,250	4.10
Mabie	Community	25,341	60,250	2.38
Tweed (Central Facility to be added)	National	152,358	124,500	0.82
Newcastleton	Community	11,950	41,250	3.45
Regional Total Phase II		265,192	647,500	2.44
Tayside				
Craigvinean	Regional	35,339	216,000	6.11
Regional Total		35,339	216,000	6.11
Fort Augustus				
Glen Urquhart / Balnain	Community	7,117	70,000	9.8
Glen Affric	Community	2,022	24,500	12.1
Balmacara / Kyleakin	Community	3,871	75,000	19.4
Inchnacardoch	Community	5,463	40,900	7.5
Regional Total		18,473	210,400	11.4
Dornoch				
Borgie	Community	467	15,600	33.4
Dunrobin Estate / Golspie	Regional	8,897	N/A	N/A
Rumster	Community	2,021	25,000	12.4
Balblair and Carbisdale*	Community	3,817	150,000	39.3
Rosehall	Community	808	10,900	13.5
Regional Total		16,009	201,500	12.6
Lochaber				
Glen Nevis	Community	5,390	73,400	13.6
Sunart Oakwoods	Community	536	15,600	29.1
Leanachan	National	16,998	270,000	15.9
Regional Total		22,924	359,000	15.7
Inverness				
Laggan Wolfrax – Phase I & II	Regional	20,946	266,000	12.7
Learnie – Future Phase I Development	Community	13,320	17,500	1.3
Regional Total		34,265	283,500	8.3
Lorne				
Mull	Community	2,815	73,000	25.9
Morven	Community	832	6,000	7.2
Regional Total		3,647	79,000	21.7

Note: * Project going ahead at a development cost of £60,000, quality issues / concerns raised by consultants

SUMMARY OF EXISTING AND PROPOSED SINGLE TRACK DEVELOPMENT			
	Existing (km)	Proposed (km)	Total (km)
Type of Development			
Strategic Trail Links	14	67	81
Green	25	32	57
Blue	24	121	144
Red	130	118	248
Black / Double	51	49	100
Total Trail Development	243	387	630
Other Emerging Developments*			
Fun Park	4	9	13
Skills Loop / Area	2	17	19
Dirt Jumping	1	4	5
Trials	1	2	3
Freeride	2	6	8
Other	1	2	3

Note: * Each represents one site development.

APPENDIX XIII

Action Plan

ACTION PLAN

As part of this framework document, a strategic action plan has been prepared. This strategic action plan has been attached to this summary of the strategic framework. This section can then be used as a standalone reference document for the executors of the future Strategy.

The action plan covers 66 action points in order to deliver the aims and priorities of the Strategy.

The aims and priority areas for action are summarised as follows:

STRATEGIC AIMS / PRIORITIES	
Aim / Priority	Priority Area
1. Maximising Opportunities for All	Market Segmentation
	Market Demand
	Widely Accessible Facilities
2. Improving and Developing the Product	Cycle Destinations
	Strategic Positioning
	Product Development Opportunities
3. Communicating with the Visitor	Route Grading
	Route and Site Interpretation and Information
	Health and Safety
	Customer Care and Quality of the Visitor Experience
4. Improving Product Sustainability	Setting and Maintaining Standards
	Trail Maintenance and Management
	Demand and Trail Sustainability and Ongoing Benefits
5. Marketing	Branding and Sub-Branding
	Marketing Framework
	Raising Profile with Events
6. Monitoring and Review	Monitoring Indicators
	Visitor Attitudinal Research
	Performance Indicators

The strategic action plan is as follows.

STRATEGIC ACTION PLAN

Strategic Aim / Priority	Priority Area	Strategic Action	Action Points	
				Priority
Strategic Aim / Priority 1: Maximising Opportunities for All	Market Segmentation	Ensure that all future development is market-led. Undertake market segmentation, methodology based on sound knowledge and understanding of customers.		Very High
		Identify key target markets for individual developments to help differentiate the product. Ensure correct facilities are developed for correct market, part of regional strategy.		Very High
	Market Demand	Quantify demand levels for individual facilities and forest sites. Support innovative approaches to maximise demand from overnight visitors and widen appeal of forest resources re tourism / recreation / destination appeal.		Very High
	Widely Accessible Facilities	With partners, ensure that cycling is part of wider recreational offer ie WIAT initiatives particularly for Aberdeenshire and Scottish Lowlands.		Very High
		Work with partners to ensure cycling is accessible to a wide range of markets.		High
		Ensure image and messages on forest cycling are attractive to novices, families, older cyclists.		High
		Work with partners at national and community level to identify social inclusion and health opportunities ie where cycling and wider forest recreation can deliver wider benefits.		Medium
		FCS to work with outdoor education sector and Scottish Cycling et al to develop a 'Go Mountain Biking' award scheme.		Low
FCS to work in partnership with Scottish Cycling in pursuance of excellence to ensure regional academies have competitive mountain bike focus.		Low		
Strategic Aim / Priority 2: Improving and Developing the Product	Cycle Destinations	Ensure 'destination tests' have been performed prior to future strategic product development at a regional / community level.		Very High
		At a regional level, work with public sector partners and private sector to ensure cycling is fully integrated with wider tourism destination credentials.		High
	Strategic Positioning	FCS must strategically position each facility national / regional / community to help guide future development.		Very High
	Product Development Opportunities	Prioritise from a national strategy perspective / fit re delivery of projects at a regional / community level.		Very High
		Carry out additional strategic development at Glentress and Leanachan Trails to make them truly 'world-class'.		Very High
		FCS to work with Nevis Range and EventScotland in improving the spectator experience for the World Championships 2007.		Very High
	Work with partners to develop new and improved central facilities at all national facilities – widen appeal of facilities to other recreational users.		Very High	

STRATEGIC ACTION PLAN (Cont'd)

Strategic Aim / Priority	Priority Area	Strategic Action	Action Points	
			By Whom	Priority
Strategic Aim / Priority 2: Improving and Developing the Product (Cont'd)	Product Development Opportunities (Cont'd)	Build on the success of the 7stanes mountain bike product by developing a network of purpose-built, sustainable 'off-road' cycling clusters throughout Scotland – linked to tourism destinations.		High
		FCS to work with partners to fill the product gap for 'off-road' facilities in the West of Scotland (see Trossachs national opportunity) aimed at local residents and overnight tourists.		High
		FCS to work with Nevis Range, VisitScotland etc to ensure a legacy from World Championships 2007 – eg more accessible downhill routes developed. Increase the number of non-Scottish visitors for cycle holidays.		High
		FCS to consider developing a range of fun and skills-based mountain bike products to maximise length of stay, encourage new markets and maximise repeat visit potential – links to WIAT etc.		High
		FCS to encourage development of multi-user trails at strategic sites.		High
		FCS, together with partners and other landowners, develop a new range of 'forest cycling' products aimed at novices, families, older cyclists – cycle tourists. Signed routes of various lengths should have fantastic views etc (see Epic brand).		High
		FCS to optimise / maximise commercial opportunities at each forest site. A structured site by site review of the potential is required.		High
		FCS to liaise closely with SDA over future development of downhill venues – permanent / temporary / events etc.		Medium
		FCS to pioneer the development of an intensive trail network approach rather than just the '3 structured loop' system.		Medium
		FCS to review national / regional internal catering / retail / information opportunities for cycling in line with wider recreation objectives.		Medium
		FCS to review / investigate / carry out survey re car parking charging, honesty / collection system for recreation as way of raising money for all walking / cycling / trail maintenance – consider opportunities for annual membership schemes.		Medium
		Develop central facilities at key regional facilities satisfying wider recreational markets and create links to local village services.		Medium
		FCS to work and lead on communication with local communities to ensure recreational support facilities are provided in the villages. This may include commercial businesses, community companies, village community facilities etc.		Low
		FCS to investigate other forms of <u>new</u> recreational provisions in key forests ie bouldering, mountain boarding etc.		Low

STRATEGIC ACTION PLAN (Cont'd)

Strategic Aim / Priority	Priority Area	Strategic Action	Action Points	
				Priority
Strategic Aim / Priority 3: Communicating with the Visitor	Route Grading	FCS to develop a fully comprehensive trail grading system for purpose-built single track facilities. Detailed policy manual to be written as guidance for trail designers / FCS regions / communities / volunteers.		Very High
		Agree that some products should not be graded ie fun parks and Epic routes, but visitors must still be informed (see information).		Very High
		Agree with partners / FCS route inspection system. Awarding of grading – routes must meet design criteria, and quality / maintenance standards must be addressed.		High
	Route and Site Interpretation and Information	FCS, together with the appropriate partners, should prepare a visitor site information and interpretation strategy for all forms of recreation, including cycling.		High
		FCS to devise and agree suite of information requirements and 'corporate' format for ungraded forest cycle routes / Epics etc.		High
		Devise FCS forest cycling and mountain biking website and link and develop regional websites (see branding).		Medium
	Health and Safety	FCS to continue to discuss and devise health and safety recreational policies including forest cycling and mountain biking in line with Great Britain level to enable consistent approach.		Very High
		Risk should be controlled and safety plans and risk assessments must be prepared for each site.		Very High
		Ensure that information tools are put in place for each forest site ie emergency procedure, accident reporting, escape routes etc.		Very High
	Customer Care and Quality of the Visitor Experience	FCS to devise / design a customer care system.		Very High
		FCS consider extending provision of mountain bike and recreation rangers at key sites – role to include customer care, trail maintenance, health and safety etc.		
		FCS to sign up as a 'friend' of 'Pride and Passion' Movement.		High
		FCS to evaluate the relevance of the new 100K Welcomes programme for recreation management / staff.		High
		FCS and lessees to participate in future VisitScotland QA and Green Tourism Schemes.		Medium
		FCS and lessees to promote skills passport system.		Medium

STRATEGIC ACTION PLAN (Cont'd)

Strategic Aim / Priority	Priority Area	Strategic Action	Action Points	
			By Whom	Priority
Strategic Aim / Priority 4: Improving Product Sustainability	Setting and Maintaining Standards	FCS to set consistently high standards of trail design throughout Scotland to meet the growing expectations of the user.		Very High
		FCS to prepare a framework document setting out good practice in mountain biking.		High
		FCS to develop a better controlled and more comprehensive and holistic system re manual for new trail development and planning to ensure trails are developed to the correct grading and standard to satisfy target markets.		High
		FCS national forest cycling development manager to support and advise on trail planning process at a community / regional level.		High
	Trail Maintenance and Management	FCS to ensure that ongoing maintenance costs on individual sections of trail are identified at planning stage.		High
		Train recreation ranger staff in trail assessment and maintenance requirements – set up system of trail checking.		High
		FCS, together with partners, to investigate innovative methods of raising monies for ongoing maintenance – see local initiatives, use of volunteers, links to community companies etc. Opportunities to maximise visitor revenue should be identified at each forest site.		Medium
		Maximise commercial / fundraising opportunities to contribute to ongoing operational costs.		Medium
	Demand and Trail Sustainability and Ongoing Benefits	FCS to develop products and techniques to encourage repeat visits by various target markets.		High

STRATEGIC ACTION PLAN (Cont'd)

Strategic Aim / Priority	Priority Area	Strategic Action	Action Points	
			By Whom	Priority
Strategic Aim / Priority 5: Marketing	Branding and Sub-Branding	FCS, together with partners, to create and test Epic brand and appropriate sub-brands.		High
		FCS to establish, create and test mountain bike brands for Northern and Central Scotland.		Medium
	Marketing Framework	FCS to develop marketing strategy and action plan for forest cycling and mountain biking which fits with wider forest recreational aspirations and other FCS strategies.		Very High
		FCS to work with Lochaber Outdoor Capital to promote Witch's, Laggan Wolftrax and eventually Brecklett as link / cluster facilities.		Medium
	Raising Profile with Events	FCS, together with EventScotland, to seek to attract more international cycling events to Scotland post-2007.		High
		FCS to work with partners to devise an effective events programme at a national, regional and community level.		Medium
		FCS to liaise closely with SDA and SXC re future events needs.		Medium
		FCS to consider sponsorship of Scottish primary and secondary school events series.		Low
		FCS to devise an events series to promote mountain bike sub-brands.		Low
	FCS to hold, with sponsors, a series of forest events to promote 'Epics' – forest cycling brand products.		Low	
Strategic Aim / Priority 6: Monitoring and Review	Monitoring Indicators	Devise and put in place a monitoring and evaluation framework.		High
	Visitor Attitudinal Research	Carry out additional visitor surveys to help guide development.		Medium
	Performance Indicators	Formulate performance indicators for inclusion in final Strategy document.		High

APPENDIX XIV

EKOS – Economic Report

EKOS – ECONOMIC REPORT

1. INTRODUCTION

1.1 CONTEXT

EKOS have examined the economic impact of a number of forest districts within Scotland, the results of which have been presented in separate reports on the economic impact of Forest Cycling in the following areas:

- Northern Scotland;
- Central Scotland;
- 7stanes;
- Grampian and Moray; and
- Tayside.

The five separate reports providing the detailed analysis and method for establishing the economic impact. The purpose of this report is to examine the combined economic impact of the various forest districts at the Scottish level. This analysis will help to inform the strategic framework and strategic action plan for the Forest Cycling and Mountain Biking National Strategy.

Table 1.1 overleaf, summarises data on the various forest cycling and mountain biking sites in terms of the forest district and Local Enterprise Company (LEC) area in which they are located and their economic positioning.

A total of 26 sites within 15 forest districts and across 15 LEC areas have been examined. Within this report, the economic impact has been assessed at the national level to inform national strategic priorities, with assessments of each site at the respective LEC level having been made in the aforementioned reports.

The sites identified in **Table 1.1** have been classified by centre type by TRC e.g. national, regional or community, based on a number of criteria (see main body of report). However for the purposes of the economic impact assessment we have categorised the sites slightly differently to reflect the level and type of visitor profile. Three of the sites fall between centre types of regional and community, with Carron Valley and Kirroughtree tending towards being a regional centre and Blairadam tending towards being a community centre.

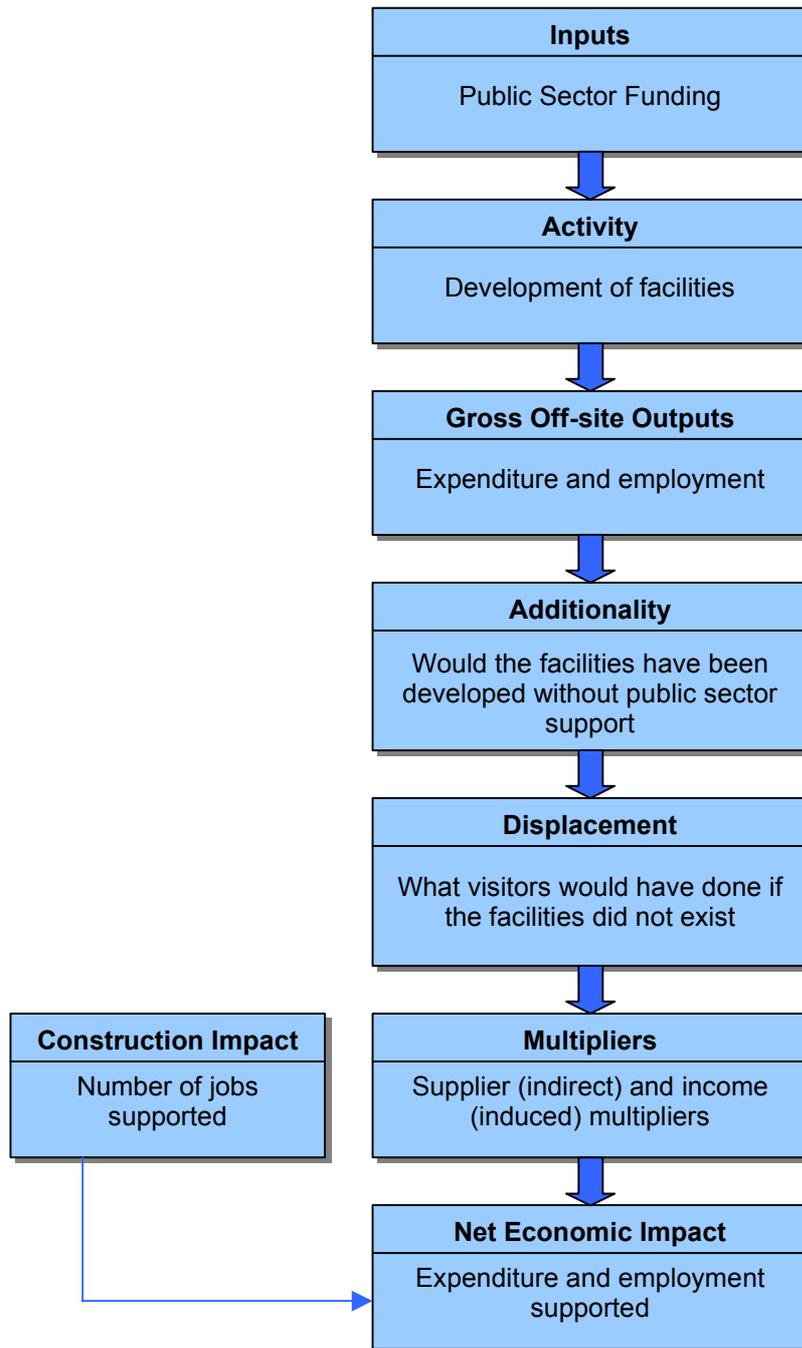
TABLE 1.1: PROPOSED DEVELOPMENTS			
Forest District	Site	Economic Positioning (EKOS)	Local Enterprise Company ¹
Northern Scotland			
Lochaber	Leanachan	National	Lochaber
Inverness	Laggan	Regional	INBSE
	Learnie	Community	RACE
Fort Augustus	Balnain	Community	INBSE
	Balmacara	Community	SALE
Dornoch	Balblair / Carbisdale	Community	CASE
Lorne	Mull	Community	AIE
Central Scotland			
Cowal & Trossachs	Queen Elizabeth Forest Park (QEFP)	National	Forth Valley
	Ardgartan	Community	AIE
Lorne	Brecklett	Regional	Lochaber
West Argyll	Crinan	Regional	AIE
Scottish Lowlands	Carron Valley	Regional / Community	Lanarkshire
	Blairadam	Community / Regional	Fife
	Arran	Regional	AIE
	Fauldhouse	Community	Edinburgh & Lothian
7stanes			
Ae	Dalbeattie	Community	Dumfries & Galloway
	Ae	Regional	Dumfries & Galloway
	Mabie	Regional	Dumfries & Galloway
Tweed	Glentress	National	Borders
	Newcastleton	Community	Borders
Galloway	Glentrool	Community	Dumfries & Galloway
	Kirroughtree	Regional / Community	Dumfries & Galloway
Banff and Buchan			
Aberdeenshire	Kirkhill	Community	Grampian
	Pitfichie	Regional	Grampian
Moray	Fochabers	Regional	Moray
Tayside			
Tay	Craigvinean	Regional	Tayside

¹ Inverness, Nairn, Badenoch and Strathspey Enterprise (INBSE); Ross and Cromarty Enterprise (RACE); Skye and Lochalsh Enterprise (SALE); Caithness and Sutherland Enterprise (CASE); and Argyll and the Islands Enterprise (AIE)

1.2 IMPACT ASSESSMENT METHOD

The analysis within this report shows the estimated net additional expenditure, employment and net Gross Value Added for each site listed in **Table 1.1**. These impacts have been calculated in accordance with HM Treasury Green Book / Scottish Enterprise guidance materials. **Figure 1.1**, over provides a summary of the process used to assess the economic impact.

Figure 1.1: Economic Impact Assessment Process



1.3 STRUCTURE OF REPORT

The remaining chapters within this section of the report consider each of the following:

- Chapter 2: economic impact of all of the sites at the Scottish level; and
- Chapter 3: economic impact split by strategic prioritisation.

2. NATIONAL ECONOMIC IMPACT ASSESSMENT

2.1 INTRODUCTION

In this Chapter we present the ex ante economic impact assessment of all the proposed developments at the Scottish level.

2.2 VISITOR ESTIMATES

2.2.1 Numbers

Estimated visitor numbers for each of the cycling trails are shown in **Table 2.1** overleaf. If all the trails were developed then the numbers of visitors is estimated at just over 770,000 (473,746 day visitors and 296,791 overnight visitors). Anticipated visitor numbers range from 2,815 in Mull to 160,496 in QEFP.

2.2.2 Profile

To assess the economic impact generated by these visitors to Scotland, it is necessary to estimate not only if they will be day or overnight visitors but also their origin. Within the separate reports prepared for each area, the origin of visitors was assessed in detail, looking at whether visitors came from the local LEC area, the rest of Scotland, the rest of the UK or overseas (*please refer to separate reports for detailed analysis*).

TABLE 2.1: VISITOR NUMBERS			
	Day Visitors	Overnight Visitors	Total
Northern Scotland			
Leanachan	2,387	14,611	16,998
Laggan	1,531	19,451	20,946
Learnie	5,885	7,435	13,320
Balnain	2,818	4,299	7,117
Balmacara	407	3,463	3,871
Balblair / Carbisdale	1,617	2,200	3,817
Mull	171	2,644	2,815
<u>Sub-Total</u>	<u>14,816</u>	<u>54,103</u>	<u>68,884</u>
Central Scotland			
Queen Elizabeth Forest Park (QEFP)	123,585	36,910	160,496
Ardgartan	23,201	13,207	36,408
Brecklett	1,589	9,392	10,981
Crinan	1,704	12,153	13,857
Carron Valley	38,177	9,996	48,173
Blairadam	37,142	9,317	46,459
Arran	3,599	4,913	8,513
Fauldhouse	14,401	2,521	16,923
<u>Sub-Total</u>	<u>243,398</u>	<u>98,409</u>	<u>341,810</u>
7stanes			
Dalbeattie	4,942	11,006	15,949
Ae	10,926	16,961	27,887
Mabie	11,988	13,354	25,342
Glentress	112,736	39,622	152,358
Newcastleton	5,152	6,798	11,950
Glentroot	1,797	6,231	8,028
Kirroughtree	5,097	18,482	23,579
<u>Sub-Total</u>	<u>152,638</u>	<u>112,454</u>	<u>265,092</u>
Banff and Buchan			
Kirkhill	25,489	5,766	31,255
Pitfichie	7,502	8,034	15,536
Fochabers	7,877	4,712	12,589
<u>Sub-Total</u>	<u>40,868</u>	<u>18,512</u>	<u>59,380</u>
Tayside			
Craigvinean	22,026	13,313	35,339
<u>Sub-Total</u>	<u>22,026</u>	<u>13,313</u>	<u>35,339</u>
National Total	473,746	296,791	770,505

2.3 EXPENDITURE IMPACTS

2.3.1 Gross Expenditure

Average spend is given in the **Table 2.2**¹. The average daily expenditure of day visitors has been estimated at £5. Average daily expenditure of overnight visitors has been broken down by Scottish and Non-Scottish visitors, as survey evidence shows that the expenditure levels of these groups vary considerably.

Day Visitors	£5
Overnight Scottish	£25
Overnight Non-Scottish	£40

The average length of stay for overnight visitors was estimated at between one and two days based on the nature of the product at each site. The level of gross expenditure was then calculated as follows:

$$GE = dv.ndv + ov.l.nov$$

Where GE gross expenditure
 dv average daily expenditure of day visitors
 ndv number of day visitors
 ov average daily expenditure of overnight visitors
 l average length of stay
 nov number of overnight visitors

However it is necessary to calculate the economic impact on the basis of net impacts rather than gross impacts.

2.3.2 Gross to Net

To calculate the net impact it was necessary to take account of:

- additionality;
- displacement, and
- multiplier effects.

2.3.3 Additionality

Additionality refers to extent to which the project will be: brought forward in time; take place at a larger scale; be of higher quality; or take place at all as a result of public sector support with the converse being *non-additionality* or *deadweight*.

For these projects the market failure can be identified as being *externality* i.e. the opportunity to extract income from the facilities would be limited. Rather the benefit accrues to businesses and individuals in the wider economy. In this case a private sector developer would not undertake the development as there would be no way for them to make an acceptable return on their investment.

Therefore, the projects would not take place without public sector support and the level of additionality was assessed as being 100%.

¹ Derived from EKOS and TRC (2004) *The 7stanes MTB Project Evaluation*, with adjustment to take account of product offering and target markets.

2.3.4 Displacement

There was also a need to discount any benefits resulting from the projects that will displace economic activity that would have taken place anyway. *Displacement* is an assessment of the extent to which the project has caused spending to be shifted from one part of the economy to another.

The displacement factors vary by centre depending on its classification e.g. national, regional or community (as identified in **Table 1.1**) and have been estimated by different visitor origin as set out in **Table 2.3**².

TABLE 2.3: DISPLACEMENT FACTORS					
	National	Regional	Community	Regional / Community ¹	Community / Regional ²
Day Visitors					
LEC Area	100	100	100	100	100
Elsewhere in Scotland	100	100	100	100	100
Elsewhere in UK	15	15	15	15	15
Overseas	15	15	15	15	15
Overnight Visitors					
LEC Area	n/a	n/a	n/a	n/a	n/a
Elsewhere in Scotland	100	100	100	100	100
Elsewhere in UK	45	50	80	60	70
Overseas	45	50	80	60	70

n/a – not applicable

¹ Between Regional and Community but tending toward Regional

² Between Regional and Community but tending toward Community

The level of displacement for day visitors varies by origin but not by site type. The level for overnight visitors vary both by origin and type of site, with the more community orientated the site, the higher the level of displacement.

Separate displacement factors are also given for three sites which fall between regional or community categories e.g. Kirroughtree and Carron Valley (tending towards regional) and Blairadam (tending towards community).

2.3.5 Multipliers

The increase in economic activity as a result of the project will also have two types of wider impact on the Scottish economy:

- *supplier effect*: an increase in sales in a business will require it to purchase more supplies than it would have otherwise. A proportion of this ‘knock-on’ effect will benefit suppliers in the Scottish economy; and
- *income effect*: an increase in sales in a business will usually lead to either an increase in employment or an increase in incomes for those already employed. A proportion of these increased incomes will be re-spent in the Scottish economy.

² Based on evaluation evidence from 7stanes, adjusted to take account of the product offering and location.

The STMS provides standard supplier and income multipliers for the tourism sector. This estimates that the combined off-site supplier and income multiplier for a rural or remote rural location at the Scottish level are:

- rural location (1.57); and
- remote rural location (1.8).

Table 2.4 categorises each of the 26 cycling trails by location.

TABLE 2.4: LOCATION	
Rural	Remote Rural
Dalbeattie	Newcastleton
Ae	Glentrool
Mabie	Kirroughtree
Glentress	Leanachan
Learnie	Laggan
Balnain	Balmacara
Queen Elizabeth Forest Park (QEFP)	Balblair / Carbisdale
Ardgartan	Mull
Carron Valley	Brecklett
Blairadam	Crinan
Fauldhouse	Arran
Kirkhill	
Pitfichie	
Fochabers	
Craigvinean	

Applying these multipliers generates net additional expenditure as set out in **Table 2.5**. Developing all of the trails would result in estimated net additional annual expenditure of £7.25 million.

TABLE 2.5: NET ADDITIONAL EXPENDITURE	
	Net Additional Expenditure
Northern Scotland	
Leanachan	£371,269
Laggan	£283,555
Learnie	£39,438
Balnain	£34,044
Balmacara	£20,912
Balblair / Carbisdale	£13,282
Mull	£16,971
<u>Sub-Total</u>	<u>£779,470</u>
Central Scotland	
Queen Elizabeth Forest Park (QEFP)	£1,436,133
Ardgartan	£351,247
Brecklett	£153,745
Crinan	£407,989
Carron Valley	£156,529
Blairadam	£100,709
Arran	£170,989
Fauldhouse	£19,563
<u>Sub-Total</u>	<u>£2,796,904</u>
7stanes	
Dalbeattie	£84,402
Ae	£310,862
Mabie	£251,461
Glentress	£1,974,798
Newcastleton	£88,446
Glentrool	£51,910
Kirroughtree	£323,841
<u>Sub-Total</u>	<u>£3,085,720</u>
Banff and Buchan	
Kirkhill	£28,168
Pitfichie	£194,745
Fochabers	£119,307
<u>Sub-Total</u>	<u>£342,220</u>
Tayside	
Craigvinean	£241,189
<u>Sub-Total</u>	<u>£241,189</u>
Scottish Total	£7,245,503

2.4 NET EMPLOYMENT IMPACT

The net employment impact is calculated by applying an appropriate spend:employment factor. The spend:employment factors in current values at the Scottish level for a rural and a remote rural area (as defined in **Table 2.4**) derived from the SE PDG³ are:

- £30,400 for a rural area; and
- £31,400 for a remote rural area.

Applying these factors to the net additional expenditure figures provided in **Table 2.5** produces net additional FTEs. This gives estimated net additional employment of 237 FTEs.

2.4.1 Construction Employment

In addition to the jobs created through visitor expenditure there will also be those jobs created through the construction of the facilities. The estimated construction costs for carrying out the development of the trails on each of the sites is given within **Table 2.6**.

Assuming that each £300,000⁴ of construction expenditure supports one FTE construction job⁵, net of displacement but including supplier linkages and income multipliers, the construction employment supported by the project will be as set out in **Table 2.7**.

It should be noted that calculating construction FTEs is for the purposes of comparison and demonstrates the level of jobs that would be supported for 10 years by the expenditure. In reality, there will be a team of trailbuilders on-site over a much shorter construction period. Also the construction jobs only relate to the building of the trails, however, the actual level of construction employment may be higher if other construction activities are necessary in support of the project such as services, access roads and car parks. However estimation of the build costs of these is outwith the scope of this study and therefore we have not calculated the construction impacts associated with these activities.

³Scottish Enterprise Project Development Guidance.

⁴Based on SE Guidance.

⁵A full time job that last for at least 10 years.

TABLE 2.6: CONSTRUCTION COSTS	
Northern Scotland	
Leanachan	£270,000
Laggan	£150,000
Learnie	£17,500
Balnain	£70,000
Balmacara	£75,000
Balblair / Carbisdale	£150,000
Mull	£73,000
<u>Sub-Total</u>	<u>£805,500</u>
Central Scotland	
Queen Elizabeth Forest Park (QEFP)	£691,000
Ardgartan	£382,000
Brecklett	£593,000
Crinan	£364,000
Carron Valley	£406,000
Blairadam	£265,000
Arran	£161,500
Fauldhouse	£120,000
<u>Sub-Total</u>	<u>£2,982,500</u>
7stanes	
Dalbeattie	£104,750
Ae	£114,250
Mabie	£60,250
Glentress	£124,500
Newcastleton	£41,250
Glentroot	£141,250
Kirroughtree	£71,250
<u>Sub-Total</u>	<u>£657,500</u>
Banff and Buchan	
Kirkhill	£150,000
Pitfichie	£420,000
Fochabers	£140,000
<u>Sub-Total</u>	<u>£710,000</u>
Tayside	
Craigvinean	£216,000
<u>Sub-Total</u>	<u>£216,000</u>
Scottish Total	£5,371,500

2.5 NET ADDITIONAL EMPLOYMENT

Table 2.7 provides a summary of the estimated net additional job impacts that would be created by the development of all 26 sites.

TABLE 2.7: NET ADDITIONAL EMPLOYMENT			
	Net Additional Employment	Construction Employment (Anticipated Spend ⁶)	Total Employment
Northern Scotland			
Leanachan	11.8	0.9	12.7
Laggan	9.0	0.5	9.5
Learnie	1.3	0.1	1.4
Balnain	1.1	0.2	1.3
Balmacara	0.7	0.3	1.0
Balblair / Carbisdale	0.4	0.5	0.9
Mull	0.6	0.2	0.8
<u>Sub-Total</u>	<u>24.9</u>	<u>2.7</u>	<u>27.6</u>
Central Scotland			
Queen Elizabeth Forest Park (QEFP)	47.2	2.3	49.5
Ardgartan	11.6	1.3	12.9
Brecklett	4.9	2.0	6.9
Crinan	13.0	1.2	14.2
Carron Valley	5.1	1.4	6.5
Blairadam	3.3	0.9	4.2
Arran	5.4	0.5	5.9
Fauldhouse	0.6	0.4	1.0
<u>Sub-Total</u>	<u>91.1</u>	<u>10.0</u>	<u>101.1</u>
7stanes			
Dalbeattie	2.8	0.3	3.1
Ae	10.2	0.4	10.6
Mabie	8.3	0.2	8.5
Glentress	65.0	0.4	65.4
Newcastleton	2.8	0.1	2.9
Glentrool	1.7	0.5	2.2
Kirroughtree	10.3	0.2	10.5
<u>Sub-Total</u>	<u>101.1</u>	<u>2.2</u>	<u>103.3</u>
Banff and Buchan			
Kirkhill	0.9	0.5	1.4
Pitfichie	6.4	1.4	7.8
Fochabers	3.9	0.5	4.4
<u>Sub-Total</u>	<u>11.2</u>	<u>2.4</u>	<u>13.6</u>
Tayside			
Craigvinean	8.9 ⁷	0.7	9.6
<u>Sub-Total</u>	<u>8.9</u>	<u>0.7</u>	<u>9.6</u>
Scottish Total	237.2	17.9	255.1

⁶ The construction employment detailed within the table is based on anticipated future construction costs.

⁷ Net additional employment for Craigvinean includes both on and off-site employment due to the on-site café.

In the case where all sites are developed, our economic impact assessment shows that up to 255 FTEs could be created. However given the costs involved it may not be possible to develop all 26 sites. TRC have carried out a strategic prioritisation of the sites and the next chapter will examine the economic impacts that would be derived from this prioritisation. This information will help future decision-making regarding the development of the sites.

3. STRATEGIC PRIORITISATION

3.1 INTRODUCTION

TRC ranked each site through development of a product prioritisation matrix (see Appendix X). The matrix set out criteria at a national level and scores were attributed to each site from 1 to 5 (5 being high priority and 1 being low priority) for the following criteria:

- number of visitors;
- access for all – wide market base;
- maximise use of forest as recreational resource – limits to other forms of recreation;
- economic benefit – overnight tourist potential / destination links;
- improve health, wellbeing and social inclusion credentials;
- critical mass / world-class credentials;
- profile – build and maintain FCS cycle profile;
- partnership potential; and
- ease of achievement.

Based on the scores derived for each site, they are then categorised as being either: essential; desirable; nice to have or do not develop at each level of positioning (i.e. national, regional and community). **Table 3.1** illustrated the number of points required to achieve the various prioritisation ranges.

TABLE 3.1: PROJECT PRIORITISATION RANGES ADOPTED			
	Points		
	<u>National</u>	<u>Regional</u>	<u>Community</u>
Essential	40+	35+	30+
Desirable	35+	30-34	25-30
Nice to have	-	25-29	20-24
Do not develop or only develop if part of wider recreation offer	-	-	< 20

The **Table 3.2** sets out TRC's prioritisation of the 26 sites.

TABLE 3.2: SUMMARY OF STRATEGIC PRIORITISATION OF SITES	
TRC Strategic Prioritisation	Site
Essential Development	
High Priority	Glentress Leanachan QEFP Kirroughtree Kirkhill
Desirable Development	
High Priority	Mabie Laggan Ae Fochabers
Medium Priority	Craigvinean Kilmichael (Cycle Crinan) Arran Dalbeattie Learnie Carron Valley Ardgartan Blairadam Balnain
Nice to have	
Medium Priority	Brecklett Pitfichie Newcastleton Glentool Balblair Balmacara Mull
Low Priority	Fauldhouse

As shown, sites have been ranked as essential, desirable or nice to have developments with further high, medium or low medium priority weightings given.

3.2 PRIORITISATION – ECONOMIC IMPACT

At this point we need to consider the employment generated by the sites as well as the cost per job and GVA. To date our assessment of construction jobs has been on the basis of anticipated spend. However for the purposes of assessing the cost per job of developments, we also need to take account of spend to date. We have therefore calculated construction employment as shown in **Table 3.3** for the total costs (i.e. both previous and anticipated future construction spend).

Furthermore, we have calculated the net additional annual Gross Value Added (GVA) at the Scottish Level for each site. The GVA has been calculated on the basis of GVA per employee⁸ within the tourism industry (£15,600) multiplied by the number of FTEs, plus GVA per employee within the construction industry (£33,700) multiplied by the number of construction FTE's.

⁸ Three-year average for both the tourism and the construction industry derived from Scottish Executive (2003) *Scottish Annual Business Statistics*.

TABLE 3.3: EMPLOYMENT CREATION				
	Total Construction Costs ¹	Total Construction Employment	Net Additional Employment	Total Employment
Northern Scotland				
Leanachan	£520,000	1.7	11.8	13.5
Laggan	£382,784	1.3	9.0	10.3
Learnie	£176,500	0.6	1.3	1.9
Balnain	£70,000	0.2	1.1	1.3
Balmacara	£75,000	0.3	0.7	1.0
Balblair / Carbisdale	£150,000	0.5	0.4	0.9
Mull	£73,000	0.2	0.6	0.8
Sub-Total	£1,447,284	4.8	24.9	29.7
Central Scotland				
Queen Elizabeth Forest Park (QEFP)	£875,000	2.9	47.2	50.1
Ardgartan	£382,000	1.3	11.6	12.9
Brecklett	£593,000	2.0	4.9	6.9
Kilmichael / Cycle Crinan	£389,000	1.3	13.0	14.3
Carron Valley	£460,000	1.5	5.1	6.6
Blairadam	£265,000	0.9	3.3	4.2
Arran	£161,500	0.5	5.4	5.9
Fauldhouse	£170,000	0.6	0.6	1.2
Sub-Total	£3,295,500	11.0	91.1	102.1
7stanes				
Dalbeattie	£431,250	1.4	2.8	4.2
Ae	£376,750	1.3	10.2	11.5
Mabie	£226,750	0.8	8.3	9.1
Glentress	£456,500	1.5	65.0	66.5
Newcastleton	£322,250	1.1	2.8	3.9
Glentroot	£164,250	0.5	1.7	2.2
Kirroughtree	£248,750	0.8	10.3	11.1
Sub-Total	£2,226,500	7.4	101.1	108.5
Banff and Buchan				
Kirkhill	£151,750	0.5	0.9	1.4
Pitfichie	£420,200	1.4	6.4	7.8
Fochabers	£145,000	0.5	3.9	4.4
Sub-Total	£716,950	2.4	11.2	13.6
Tayside				
Craigvinean	£216,000	0.7	8.9	9.6
Sub-Total	£216,000	0.7	8.9	9.6
Scottish Total	£7,902,234	26.3	237.2	263.5

¹ Includes previous and anticipated future spend.

In order to align our economic impact assessment with the strategic prioritisation framework established by TRC, we have categorised the economic impacts by essential, desirable or nice to have sites. **Table 3.4** highlights the economic impact resulting from “essential” sites.

TABLE 3.4: ESSENTIAL DEVELOPMENT ECONOMIC IMPACT				
Site	Development Costs	Employment Impact	Cost per job	GVA
Essential Development – High Priority				
Glentress	£456,500	66.5	£6,862	£1,065,280
Leanachan	£520,000	13.5	£38,424	£242,493
QEFP	£875,000	50.1	£17,459	£834,612
Kirroughtree	£248,750	11.1	£22,351	£188,623
Kirkhill	£151,750	1.4	£107,943	£31,087
Total	£2,252,000	142.7	£15,781	£2,362,095

Total development costs for those sites considered to be essential are £2.25 million. Based on 142.7 FTEs being created by the five sites, the average cost per job is £15,781.

At the individual site level the cost per job varies substantially from £6,862 for Glentress to £107,943 for Kirkhill. However for a site such as Kirkhill, cost per job is only one measure in relation to the development of the site. The strategic prioritisation framework takes into account more than economic factors; therefore in the case of Kirkhill there are a number of other factors that have deemed it an essential development.

The cost per job for Leanachan is also higher than for other sites (with the exception of Kirkhill), however consideration must be made for the fact that this is a national centre for events (the estimation of the impact from events was out with the scope of this study) and the impact of such events would reduce the cost per job at the site significantly.

TABLE 3.5: DESIRABLE DEVELOPMENT ECONOMIC IMPACT				
Site	Development Costs	Employment Impact	Cost per job	GVA
Desirable Development – High Priority				
Mabie	£226,750	9.1	£25,039	£154,952
Laggan	£382,784	10.3	£37,251	£183,399
Ae	£376,750	11.5	£32,887	£201,442
Fochabers	£145,000	4.4	£33,080	£77,128
<u>Sub-Total</u>	<u>£1,131,284</u>	<u>35.2</u>	<u>£32,165</u>	<u>£616,921</u>
Desirable Development – Medium Priority				
Craigvanean	£216,000	9.6	£22,453	£163,104
Kilmichael	£389,000	14.3	£27,209	£246,498
Arran	£161,500	5.9	£27,196	£102,382
Dalbeattie	£431,250	4.2	£101,770	£92,124
Learnie	£176,500	1.9	£93,469	£40,107
Carron Valley	£460,000	6.6	£69,347	£131,233
Ardgartan	£382,000	12.9	£29,674	£223,871
Blairadam	£265,000	4.2	£63,347	£81,248
Balnain	£70,000	1.3	£52,500	£25,023
<u>Sub-Total</u>	<u>£2,551,250</u>	<u>61.0</u>	<u>£41,821</u>	<u>£1,105,590</u>
Total	£3,682,534	96.2	£38,290	£1,722,511

Table 3.5 shows the economic impact of the 13 sites that are classified as desirable within the strategic prioritisation framework. Combined, these sites are expected to cost £3.7 million to develop and will create 96.2 FTE's and £1.72 million GVA. The average cost per job for desirable sites is £38,290 but when split into high and medium it averages £32,165 and £41,821, respectively.

Lastly **Table 3.6** highlights the economic impact resulting from “nice to have” sites.

TABLE 3.6: NICE TO HAVE SITES – ECONOMIC IMPACT				
Site	Development Costs	Employment Impact	Cost per job	GVA
Nice to have sites – Medium Priority				
Brecklett	£593,000	6.9	£86,234	£143,054
Pitfichie	£420,200	7.8	£53,867	£147,042
Newcastleton	£322,250	3.9	£83,179	£79,879
Glentroot	£164,250	2.2	£73,081	£44,971
Balblair	£150,000	0.9	£166,667	£23,090
Balmacara	£75,000	1.0	£78,947	£19,345
Mull	£73,000	0.8	£86,561	£17,560
Sub-Total	£1,797,700	23.5	£76,523	£474,942
Nice to have sites – Low Priority				
Fauldhouse	£170,000	1.2	£145,714	£77,128
Sub-Total	£170,000	1.2	£145,714	£77,128
Total	£1,967,700	24.7	£79,796	£552,070

Total development costs for the “nice to have sites” are estimated to be £1.97 million and the total employment impact is 24.7 FTEs. The average cost per job across all the nice to have sites is £79,796.

3.3 SUMMARY

Table 3.7 summarises the data from previous tables and allows comparison of the economic impacts stemming from essential, desirable and nice to have developments.

TABLE 3.7: SUMMARY OF STRATEGIC PRIORITISATION ECONOMIC IMPACT					
Priority	Total Employment	Proportion of Total Employment	Total Construction Costs	Proportion of Total Construction Costs	Average Cost per job
Essential Development					
High Priority	142.7	54.1%	£2,252,000	28.5%	£15,781
Sub-Total	142.7	54.1%	£2,252,000	28.5%	£15,781
Desirable Development					
High Priority	35.2	13.3%	£1,131,284	14.3%	£32,165
Medium Priority	61.0	23.1%	£2,551,250	32.3%	£41,821
Sub-Total	96.2	36.5%	£3,682,534	46.6%	£38,290
Nice to have sites					
Medium Priority	23.5	8.9%	£1,797,700	22.7%	£76,523
Low Priority	1.2	0.4%	£170,000	2.2%	£145,714
Sub-Total	24.7	9.4%	£1,967,700	24.9%	£79,796
Total	263.5	100.0%	£7,902,234	100.0%	£29,985

Essential development sites create the largest proportion of employment (approximately 54%) whilst only accounting for 28.5% of total construction costs. Desirable development sites would account for 46.6% of total construction costs and are estimated to create 36.5% of all employment, while nice to have sites would account for 24.9% of total construction costs yet only 9.4% of all employment generated.

The average cost per job is lowest for essential sites at £15,781 and increases as you move down the prioritisation scale.