

# **Forestry Commission Scotland**

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

**Final report – Executive Summary  
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### **TOURISM RESOURCES COMPANY**

*Management Consultancy and Research Services*

2 LA BELLE PLACE, GLASGOW G3 7LH

Tel: 0141-353 1143 Fax: 0141-353 2560

Email: [info@tourism-resources.co.uk](mailto:info@tourism-resources.co.uk)

[www.tourism-resources.co.uk](http://www.tourism-resources.co.uk)

# 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.

**Table 1: Strategic aims and priorities**

<b>Aim / Priority</b>	<b>Description</b>
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.

### 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. 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.