DEVELOPING OFF-ROAD CYCLING IN WOODLANDS IN THE SOUTH WEST

A FEASIBILITY STUDY

DECEMBER 2006

Forestry Commission England

SOUTH WEST WOODLAND RENAISSANCE

southwesttourism
The Regional Tourist Board for the South West of England

SOUTH WEST PROTECTED LANDSCAPES FORUM

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EXECUTIVE SUMMARY

The Study

Roger Tym & Partners and Total Marketing Solutions were commissioned in 2006 by the Forestry Commission, Woodland Renaissance, South West Tourism and South West Protected Landscapes Forum to study the opportunities for off-road cycling in South West woodlands. IMBA-UK and the CTC helped guide the study

The study estimates the current demand for woodland cycling in the region, the economic impact and the potential demand for woodland off-road cycling. It includes an audit of woodland cycling locations, a survey of 800 woodland cyclists and discussion with cycling clubs, landowners and stakeholders.

The study considers the different types of off-road cycling facilities that might be developed in woodland and sets out a framework to assess these development options against environmental, economic and community impacts. It also reviews commercial opportunities from woodland off-road cycling.

This study is a response to issues facing traditional forestry, with falling timber prices, less employment, reduced maintenance and lower harvesting rates.

The Key Findings

Demand

There is considerable demand for woodland cycling across the South West with the number of current woodland cycling trips estimated at between 4 million and 8 million *per annum*. Of these, an estimated 1 million cycling trips are by visitors to the region. This cycling activity has a significant economic impact with a regional spend of between £81 million and £129 million *per annum* supporting 1,300 to 2,000 full time equivalent jobs[1].

Development of new woodland off-road cycling facilities in the South West and across the UK has revealed strong latent demand.

The potential future demand for woodland off-road cycling is considerable. The local population alone has the potential to make between 6.8 million and 10.5 million woodland cycling trips per annum. The demand from the large visiting tourist population is not fully exploited and the activity fits well with the visitor segments offering good potential for the region.

Supply

Woodlands are ideal locations for off-road cycling, with a relatively robust surface, good carrying capacity and the ability to segregate cyclists from other users. However, some sensitive woodland locations are not suitable for off-road cycling e.g. ancient woodland.

Over 200 woodland off-road cycling locations were identified in the South West. The main locations can be grouped into 11 cycling 'Hubs'. Six are 'Geographic Hubs' (a concentration of locations within a specific area) and four are 'Focal Point Hubs' (clearly identifiable centres).

Geographic Hubs

- Dartmoor
- Woodbury
- Exmoor
- Quantocks
- Mendips
- Purbeck

Focal Point Hubs

- Ashton Court
- Blandford Forest
- Haldon Forest Park
- Forest of Dean Centre
- Moors Valley

In addition, the Tamar Valley Mining Heritage Project has the potential to become an additional 'Focal Point Hub'.

[1] See Chapter 5 for the basis of these calculations

The 'Focal Point Hubs' offer the potential for greater economic return and they also attract a wider set of users. The 'Geographic Hubs' tend to have less formal facilities and are generally used by more expert off-road cyclists.

The demand and supply evidence suggests a clear gap in provision in Cornwall and opportunity to develop more facilities in both the south east and north east of the region.

Benefits

Planned development of woodland cycling can:

- Provide regional economic benefits
- Bring benefits to woodland owners through a range of commercial opportunities as well as delivering other benefits across a range of key strategic issues.
- Address the health agenda and issues of social inclusion
- Help to manage and control the environmental impact of recreation on sensitive sites

Recommendations

It is recommended that:

1. One high profile specialist centre to be developed in the west of the region, possibly based around Cardinham Woods near Bodmin, to attract visitors to the region and deliver potentially significant economic benefits at a cost of around £2 million
2. The development planned as a part of the Tamar Valley Mining Heritage Project is used to provide another specialist centre within easy reach of Plymouth
3. Develop a set of 10 Geographic Hubs to be way marked and information provided at a cost of £200,000-£400,000 in order to serve the enthusiasts market, provide some facilities for family cycling and direct people away from sensitive areas and towards locations with opportunities for economic benefits. Potential locations include parts of the Mendips, Dartmoor, Exmoor, the Quantocks, Woodbury and the Purbecks
4. Six member centres are developed each with about eight kilometres of trail, at a cost of £576,000, serving the local enthusiasts market. There are a variety of potential woodlands including opportunities in Cornwall, the Mendips and the Quantocks
5. A SW cycling brand is developed, to include cycling in woodlands at a cost of about £50,000.

The development costs may be another £500,000 once staff time and feasibility studies are undertaken, and it is possible that marketing development and contingency will result in a need for up to £500,000. This suggests a total budget of about £4 million.

Along with these core recommendations further supporting recommendations include:

- Adoption of industry standard trail assessment and accreditation
- Exploration of the most suitable locations for developments and detailed feasibility studies for each one
- Development of a dedicated brand to link the facilities and, though provision of information, encourage the spread of use and benefits from the woodland cycling locations
- Development of networks to foster communication between landowners and cyclists

Within these developments there are commercial opportunities from woodland cycling that may be exploited by the private or public sector woodland owners, such as

- Local mountain bike club member centre
- Pay to ride access
- Chargeable facilities such as car parking, catering, changing/shower and bike wash
- A cycle hire facility and/or cycle shop
- Camping / accommodation
- Uplift (for sites with downhill courses)
- Ride guide holiday operators

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1 INTRODUCTION

1.1 Roger Tym & Partners and Total Marketing Solutions were commissioned by the Forestry Commission, Woodland Renaissance, South West Protected Landscapes Forum and South West Tourism to undertake this study of off-road cycling in woodlands in the South West.

1.2 The objectives of the study were to:

- Assess existing supply
    - Audit of current provision
    - Assessment of current carrying capacity and potential for increasing capacity, including non-financial barriers.
- Analyse current and potential demand
    - Assess current and potential future demand for off-road cycling in the woodlands of the SW
    - Calculate current levels of income the activity generates
    - Identify potential opportunities for increasing income to woodland owners and the wider rural economy
    - Assess need for dedicated off-road cycling sites within Mendip Hills, Quantock Hills, Tamar Valley, Exmoor, Dartmoor, and Blackdown Hills, Forest of Dean, New Forest, Forest of Avon & Great Western Community Forests, and South West Forest.
- Provide recommendations for product development
    - Analyse the strategic location of current provision in relation to demand.

1.3 The study considers the variety of markets for off-road cycling in woodlands, from expert mountain bikers seeking technical and challenging experiences to families seeking high quality countryside environments for traffic-free recreation.

Study Process

1.4 The study used a variety of published and unpublished information sources to identify woodland cycling locations in South West England. This information was supplemented through interviews with stakeholders, including the Forestry Commission, AONB officers, land owners and cycling clubs.

1.5 Once the main locations had been identified, further detail was collected and collated for the main woodland cycling hubs.

1.6 An extensive cycle survey was commissioned by the study group to help assist with the profiling of south west cyclists. Using survey sites at the popular South West hubs the survey was able to collect information regarding the cycling market across the South West as a region and on an individual site by site basis.

1.7 Research into the demand for off-road cycling was also undertaken through analysis of published and unpublished data as well as the study survey. This work built upon existing segmentation developed through organisations such as Sustrans and considered the size, characteristics and distribution of resident and visitor populations in the South West.

1.8 We are grateful for the assistance provided during this study from the Forestry Commission, South West Protected Landscapes Forum, South West Tourism, Woodland Renaissance, the International Mountain Bike Association and the many clubs and organisations that willingly supplied information as part of this study.

2 CONTEXT

Introduction

2.1 This section considers the role of woodlands and woodland cycling within key strategies for the natural environment, tourism, communities and health in the South West.

Woodlands

2.2 Woodland[2] covers almost 9% (212,000 hectare) of the South West and trees grow particularly well because of the region's climate. Large woodlands (over 20 hectares) account for over 65% of the forested area and constitute the main timber production areas. 77% of all woods and forests by area are in private ownership. The Forestry Commission manages 17% of all woodland (representing 74% of the forests/woodland in public ownership). Other important owners include private estates, local authorities and environmental charities. The owners of these larger blocks of woodland have an important influence over patterns of use and economic activity. However, smaller woodlands are also highly important for nature conservation and landscape. There are 15,000 woodlands under 2 hectare, although they only account for 3% of the total woodland area.

2.3 Employment in traditional forestry activities has declined over time, maintenance has been reduced and harvesting rates have dropped. There is a need to build in other commercial activities in woodlands to support the core forestry activity, with the opportunity for multi-purpose use of woodland to form a composite business model.

2.4 Off-road cycling in woodlands is an activity dependent upon access to the countryside and in many cases relies upon the public rights of way network. As the use of the countryside increases, there is pressure on land managers to provide access arrangements and ensure rights of way are accessible. Increased permissive access is often a condition attached to grants for woodland owners and this has resulted in the opening of considerable new woodland for public use.

Environment

2.5 The high quality of the environment within the South West is of key importance in tourism terms as well as underpinning wider economic development priorities (e.g. inward investment etc.). There have been a number of studies[3] demonstrating the value of the conserved landscape to the economy and it is recognised that this is an important asset to be capitalised upon and enhanced. Woodlands and forests in the South West are clearly part of this high quality landscape.

2.6 While the landscape is one of the region's major assets, some of the most precious parts of the landscape are relatively fragile and vulnerable to inappropriate or over use. Acceptable levels of use will depend on the characteristics of individual sites. Issues include impacts on visual amenity and the acceptable visitor carrying capacity of an area, as well as erosion.

2.7 Previous research[4] concluded that mountain bikes do not have more impact on trails than walkers. It is clear from this research that all countryside uses including walking, running, cycling, horse riding etc. have some environmental impact and that lasting

[2] SW England Woodland and Forestry Strategic Economic Study, 2003
[3] Such as Valuing Our Environment, 1999, by the National Trust which explored the value of the conserved landscape
[4] Department of Conservation, New Zealand,1995 and IMBA Natural Resource Impacts of Mountain Biking, 2004

damage is generally caused by overuse rather than any specific form of use. The research concluded that the location and construction of trails through vulnerable areas was more important than the type of activity.

2.8 Cycling in woodlands may conflict with other activities and issues such as speed and jumps may add to concerns from other users. However, the main issue[5] is that different user types are often inherently uncomfortable with other uses of the same trails e.g. some walkers also perceive conflicts with runners, despite being both low impact and 'passive' foot traffic.

2.9 A great deal can be achieved to reduce environmental impact by the building of 'sustainable trails'. IMBA provide guidance on building trails which protect the environment, meet the needs of a variety of users, require little maintenance and minimise conflict between different use groups[6].

2.10 Woodlands can often be more robust than other landscape types, particularly in terms of carrying capacity and their ability to hide considerable levels of use. The natural barriers provided by vegetation can be used to segregate cyclists from other users, particularly in locations where cyclists (or runners/horse riders) may be moving at speed or jumping. This separation is possible even in relatively confined areas. Furthermore, commercial woodland can also provide a relatively robust surface for cycling through the use of forest rides and tracks. Extensive root systems in the forest help to bind together the surface for single track trails. Woodland also provides shelter from wind and rain making off-road cycling more enjoyable in adverse conditions.

2.11 Solutions to environmental and conflict issues have been achieved or delivered through the use of trail information, segregating trails, way marking, codes of conduct and consultation with different user groups. At a more strategic level, it is possible to select some areas to have information for recreational provision and others to have none in order to direct visitors to the most appropriate locations.

2.12 As well as the direct impacts on the specific locations used for off-road cycling, there are the impacts of access to these locations. Many woodland cycling locations have limited car-free access and the use of private transport is by far the most popular method of accessing hubs/cycling locations. Even where sites are relatively close to large urban conurbations, public transport options are limited. As well as the impacts on the environment, this effectively reduces the opportunities for people without access to a vehicle.

2.13 The issue of car access to off-road cycling locations is shared with other users of the countryside. It is also a feature of the bulk of tourism in the region (with around 80% of visitors arriving by car[7]). It is beyond the scope of this report to deal with these wider issues and instead the study considers how existing and potential environmental issues from accessing off-road cycling locations can be minimised.

Tourism and Recreation

2.14 Around 47% of the woods and forests in the region provide some level of public access for informal recreation and use of these woodlands is estimated to generate at least £211 million per year[8]. Of this total, local people make over 32 million trips to woods and forests in the region each year and spend in excess of £90 million per year in the process. Tourist activity accounts for a further 10 million trips and generates in the region of £120 million per year. It is estimated that only a very small fraction of this expenditure benefits woodland owners and managers directly.

[5] Dept of Conservation, New Zealand, 1995
[6] Trail Solutions IMBA Guide 2004
[7] UKTS 2003
[8] SW England Woodland and Forestry Strategic Economic Study, 2003

2.15 The range of land and marine based sports tourism is estimated to bring £90 million into the South West[9]. Those seeking adventure through activities such as cycling, orienteering, combat games and motor sport activities contribute between £5 - £10 million per annum[10].

2.16 The strategic themes for developing tourism in the South West are sustainability, quality and better destination management. While off-road cycling in woodlands is typically between May to September, enthusiasts will be less seasonal. Woodland off-road cycling is therefore a relatively non-seasonal quality activity that makes use of the region's key asset and, through providing an income stream to support this asset, contributes towards better management.

2.17 There is likely to be an increase in the number of holidays which promote good health and well being and an increase in holidays which combine hobbies and interests. Two of the brand clusters being developed through South West Tourism are 'It's Adventure' and 'Close to Nature', both of which are relevant to developing off road cycling in woodland in the region. The development of these and the other brand clusters is part of the mechanism that will be used to deliver the regional tourism strategy targets for increased tourism spend.

Communities

2.18 National and regional priorities include offering socially excluded communities more opportunities to experience the natural environment and embrace 'active living' (sport and health).

2.19 Poorer sections of the community are less likely to participate in off-road cycling in woodlands than the more affluent[11]. There are a number of groups less likely than average to participate in woodland off-road cycling:

- Poorer couples and school age families in terraced and semis
- Young single & family communities in small terraces and rented flats
- Poorer singles in outer suburban family neighbourhoods
- Poorer singles & families in mixed tenure
- Mixed mortgagees and council tenants in outer suburbs

2.20 Little use of cycling sites by these groups highlights social inclusion issues for off-road cycling. These groups also have the potential to be new commercial markets for woodland cycling.

2.21 Access to existing cycling locations is often by private transport, which will exclude people without access to a car. Some initiatives have been developed to provide access opportunities e.g. Dartmoor Freewheeler, although these types of services are rare.

2.22 There is evidence that schemes to engage young people at risk from pursuing criminal behaviour in sport can have significant benefits for the individuals concerned and their host communities. Woodland off-road cycling is part of a suite of activities that would be suitable for this purpose. Mountain bike skills training has the potential to appeal to socially excluded groups particularly where equipment is included.

2.23 Part of the challenge is to increase the attractiveness of off-road cycling in woodlands to all parts of the community, as well as ensuring that disadvantaged sections of the community have the opportunity to pursue the sport. Examples of work to address this issue includes a scheme taking people from deprived areas of Bristol to the Forest of

[9] South West Tourism includes the wide range of land and marine based sports activities
[10] SW England Woodland and Forestry Strategic Economic Study, 2003
[11] The demand section later in this report provides more detail

Dean, which had the impact of increasing the subsequent use of Ashton Court for cycling by the people involved.

Health

2.24 A lack of physical activity by the UK population has increased the pressure placed upon the National Health and this in turn has financial costs. In response the Government has set targets for individual physical activity levels. These recommend that 70% of the population should be reasonably active i.e. 5 sessions of 30 minutes of moderate exercise per week by 2020. In the South West the target is to increase activity participation rates by 1% year on year[12].

2.25 The Government is keen to promote ways in which the environment can be used to good effect in terms of people's health. Use of the natural environment for family focused activities is an important theme within sports, health and environmental agendas. Initiatives which appeal to children and the young to provide a 'healthy framework for life' are a current priority. Overall there is a recognition that the environment can be a good resource with which to affect change in people's health and that the capacity of the natural environment to cater for such activities should be expanded[13].

2.26 Sports activities and active walking in woodlands in the region may save £2 - £7 million a year in reducing mortality from heart disease[14]. There is an opportunity for reducing individual and public health costs associated with heart disease, obesity, diabetes and other diseases linked with lifestyles through promoting active exercise in woodlands and forests.

Summary

2.27 Woodlands are a significant part of the region's high quality landscape. The management of these woodlands is under threat from poor timber prices, reduced employment and maintenance and falling harvest rates.

2.28 The South West's landscape is one of the region's key assets, the basis for much of the tourism industry, underpins other sectors and attracts inward investment. However this asset is fragile and vulnerable to inappropriate or over use.

2.29 Compared to many other landscape types, woodlands offer:

- Higher carrying capacity
- An ability to hide considerable levels of use
- The use of vegetation to segregate cyclists from other users, even in relatively confined areas
- A relatively robust surface for cycling and other uses
- Mechanisms for repairing damage

2.30 As a result, woodlands are often suitable for some of the activities that may be putting other landscapes under pressure.

2.31 In common with other recreation in the countryside, off-road cycling in woodlands has environmental impacts through access by private car.

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[12] Choosing Health, The Value of Sport to the Health of the Nation, Regional Plan for Sport 2004-08, Framework for Sport in England
[13] Regional Woodland & Forestry Framework, Trees & Woodlands – Natures Health Service, Regional Plan for Sport, the Value of Sport to the Health of the Nation
[14] SW England Woodland and Forestry Strategic Economic Study, 2003

2.32 While there is considerable use of woodlands for recreation, the woodland owners and managers receive a small fraction of the wealth generated.

2.33 Off-road cycling can contribute to regional tourism priorities through providing a relatively non-seasonal quality activity that makes use of the region's key asset and appeals to two of the brand clusters that present opportunities for the South West.

2.34 A significant proportion of ill health is linked to inactivity and this presents a financial cost to the National Health Service. Woodlands are recognised as providing opportunities to build activity rates.

2.35 Although off-road cycling in woodlands has the potential to include socially excluded groups it is apparent that the provision of facilities will need to be supplemented by supporting initiatives to make any impact. Currently deprived parts of the community are less likely to cycle in woodlands.

3 DEMAND FOR WOODLAND CYCLING

Introduction

3.1 This section of the report considers the actual and potential demand for off-road woodland cycling in the South West.

3.2 The data available concerning the demand for off-road cycling in woodlands throughout the region is limited. In order to give the demand analysis a stronger foundation, a survey of cycling activity in woodlands throughout the South West was commissioned. In June and July 2006, a total of 836 woodland cyclists were questioned (see Appendix 4 for a copy of the questionnaire). This survey indicated that:

- Off-road cycling is principally a day trip activity. Only 10% of those surveyed were cycling during a staying visit away from home
- The Moors Valley and Forest of Dean cycle centres featured greater proportions of staying visitors, 25% and 22% respectively. Assessment of surveyed sites suggests that presence of a bike hire facility will attract staying visitors looking for activities whilst on holiday
- Over 40% of the staying visitors indicated that cycling was either the main reason for visiting the South West or that it was a very important part of their trip
- The greatest proportion of cyclists surveyed were family groups, who formed 44% of the sample. Family riding was particularly popular at the specialist centres. There were more male than female riders
- 50% of cyclists are regular off-roaders, cycling more than four times per month
- The Forest of Dean pulls people from the greatest distances, with almost 50% travelling between 20 and 50 miles, compared to the average of 23%. Generally the largest proportion only travel 5 miles or less (31%)
- The main reason for choosing where to cycle is based on a variety of factors. However, the most popular response was that the location provided challenging cycling (27%). Other popular reasons include: ease of access (16%), provision of safe cycling (11%), family friendly cycling (16%) and for the scenery and landscape (16%).
- In general centres such as Forest of Dean, Haldon and Moors Valley feature a higher volume of riders looking for safe and family orientated cycling, while users of the informal locations such as the Quantocks, Mendips and Woodbury have lower volumes, and users seeking locations with challenging terrain

3.3 The outputs from this survey have been used to refine the estimates of potential demand for woodland-based cycling in the region.

Current Demand Estimates

3.4 It is possible to estimate demand figures from two main data sources and these are reviewed below.

IMBA-UK Estimate

3.5 In September 2005, the International Mountain Biking Association UK (IMBA-UK) estimated that there were 5.5 million mountain bikers in the UK, making an estimated 78 million rides per year.

IMBA – Estimated UK Mountain bike

Mountain bike segment	No. of mountain bikers	No. of rides/year
Family / Casual	3.0m	9.0m
Regular trail cyclists	1.2m	19.0m
Enthusiasts	1.3m	50.0m
Total	**5.5m**	**78.0m**

Source IMBA-UK

3.6 Theses estimates were based upon the following

- UK population is 60 million of which 20% are under 16, so adult population is 48 million
- Since 1986 some 44 million UK cycles have been purchased
- BikeEurope suggests that the sales breakdown is 40% adults, and 60% under 16, so adult bicycle sales are 40% of 44 million = 17.6 million
- 55% of all cycles sales in the US are mountain bikes (including children)
- UK trade sources suggest that this seriously under estimates the proportion of UK mountain bikes sold to adults in the period 1986 to 2004. It is estimated that mountain bike adult sales would be nearer a figure of around 75% total bike sales during this time
- 75% of 17.6 million gives us total UK mountain bike sales 1986 - 2004 of 13 million mountain bikes
- It is suggested that 15% of these have been scrapped, giving 11 million mountain bikes ready for use
- Assuming one mountain bike per user, then 23% of the adult UK population owns a mountain bike
- US data shows that 25% of the US population rides a mountain bike off-road more than once a year, giving an average number of 18 off-road rides per year per mountain bike rider. i.e. around one ride every three weeks
- It is highly unlikely that this level of off-road is attained in the UK, as it is suggested that 50% of UK mountain bikes are either unused, only occasionally used, or only used on the road
- This leaves 50% of 11 million = 5.5 million UK riders who ride off-road at least once per year

3.7 An estimate can then be made of UK adult mountain bike off-road use by using US use figures as a template:

IMBA-UK, estimated riding frequency

Riding Frequency	Total Number of Rides	User Category
15% ridden once per year.	0.8 million rides per year	Family / Casual
15% ridden twice per year	1.7 "	Family / Casual
25% ridden 3 - 6 /year	6.2 "	Family / Casual
9% ridden 7 - 10 /year	4.2 "	Regular
13% ridden 11 - 30 /year	4.7 "	Regular
23% ridden 31 + /year	50.6(Based on 40 UK rides)	Enthusiasts
TOTAL	**78.2 million rides per year**	**All**

Source: IMBA-UK

3.8 IMBA-UK recognises that the above figures are, at best, an estimate but it does provide a basis from which to calculate similar figures for the South West using data for the resident population.

South West Estimate

3.9 Using the same IMBA-UK approach for the South West, it is possible to estimate that there are 800,000 mountain bikers in the region making an estimated 11.36 million rides per year.

Estimated South West Mountain Bike Rides

Mountain bike segment	No. of mountain bikers	No. of rides/year
Family / Casual	440,000	1.26m
Regular trail cyclists	176,000	2.74m
Enthusiasts	184,000	7.36m
Total	**800,000**	**11.36m**

3.10 Of the 5 million population of the South West, approximately 4 million are aged over 15 and can be considered as ‘adult’ for the purpose of this calculation.

3.11 Given the older age profile of the South West compared to national figures, it is assumed that a smaller proportion of the adult population own a mountain bike.

3.12 If a figure of 20% is assumed, then this gives a total of 800,000 mountain bikers in the South West.

Estimated riding frequency in the South West

Riding Frequency	Total Number of Rides	User Category
15% ridden once per year.	120,000 rides per year	Family / Casual
15% ridden twice per year	240,000 "	Family / Casual
25% ridden 3 - 6 /year	900,000 "	Family / Casual
9% ridden 7 - 10 /year	612,000 "	Regular
13% ridden 11 - 30 /year	2,132,000 "	Regular
23% ridden 31 + /year	7,360,000 (Based on 40 UK rides)	Enthusiasts
TOTAL	**11.36 million rides per year**	**All**

3.13 Using the IMBA-UK approach provides one estimate of the current level of mountain bike riders in the South West.

3.14 This approach, however, makes no distinction between where these mountain bike rides occur or whether they are on-road or off-road cycling trips and whether they involve cycling woodlands.

3.15 Even if accurate to acceptable tolerances, the demand for off-road cycling in woodlands in the South West will be somewhat less than this figure of 11.36 million rides per annum.

3.16 Based on the assumption that 70% of all mountain bike rides in the region take place in woodlands, this would give an estimated demand of 7.96 million rides per annum. This is a broad assumption and this figure of 70% needs to be more rigorously researched before a more accurate estimate can be determined using the IMBA based approach.

Estimates of demand based on the GB Day Visit Survey (GBDVS) Data

3.17 The second of the two main data sources is based upon the regular national Day Visits Survey (GBDVS).

Estimates at a GB level

3.18 The GBDVS 2002 – 2003 recorded data for leisure day visits taken in Great Britain from March 2002 to March 2003.

3.19 A leisure day visit is defined as a round trip made from home for leisure purposes to locations anywhere in Great Britain. People must start from and return to their home within the same day but there is no lower time limit.

3.20 This 2002 – 03 survey also isolated information about 'tourism' leisure day visits as a subset of the total. These are defined as leisure day visits that last more than 3 hours and are not undertaken on a regular basis.

3.21 In Great Britain as a whole 40% of adults had visited a wood / forest in the past year. This equates to around 252 million trips to a wood/forest in 2002 – 03.

3.22 The survey identified that cycling was the main activity in 8% of all trips to a wood/forest, equating to 20.1 million cycling trips in woods/forests across the whole of Great Britain.

Estimates for the South West

3.23 Detailed information on activities undertaken on a trip to a wood/forest is not available within the survey at a regional level; however data is available on the number of trips taken to a wood / forest at this level.

3.24 A total of 34 million leisure day visits were made to a wood/forest in the South West region in 2002 – 03.

3.25 If the national figure of 8% for cycling activity is applied, then it is possible to estimate that there were 2.72 million leisure day visits to woods/forests in the South West where cycling was the main activity.

3.26 In addition, there were an estimated 4 million 'tourism' leisure day trips in the South West in the survey period. Applying the national figure of 8% for cycling activity would give an estimated 320,000 'tourism' leisure day visits to woods / forests in the South West where cycling was the main activity.

Estimated South West Cycling Day Trips in a Wood / Forest

Trip Type	No. of trips
Cycling leisure day trip	2,720,000
Cycling 'tourism' leisure day trips	320,000
Total	**3,040,000**

3.27 By their nature, most of these cycling trips to a wood/forest in the South West can be assumed to be off-road cycling trips usually involving use of a mountain bike.

3.28 If the assumptions concerning cycling activity can be relied upon, this does appear to provide a reasonable view of existing demand from the local population.

Estimates of Current Demand from Tourism Data

3.29 The UK Tourism Survey (UKTS) measures the value and volume of tourist activity within the UK by region.

3.30 They also measure activities undertaken by UK tourists whilst on a trip in the UK. Activities are measured and reported in two ways:

- As an activity undertaken whilst on a holiday trip
- As an activity which is the main purpose of the holiday trip.

Estimates of Cycling as an Activity Undertaken on a Holiday trip

3.31 In 2002 UKTS reported the following figures for cycling as an activity undertaken as a part of a holiday trip in the South West:

Cycling as an Activity on a Holiday Trip in the South West

Cycling Type	No. of trips
Off-road cycling	800,000
Cycle touring	600,000
Total	**1,400,000**

3.32 In 2003 UKTS reported a figure of 1,100,000 holidays trips where cycling was undertaken as an activity. There was no breakdown between off-road and cycle touring as per the previous year. It is difficult to believe that a 15% decline in cycling activity really occurred between the two years and this is more likely explained by a statistical anomaly.

3.33 It is reasonable to assume that the total volume of cycling trips undertaken as an activity whilst on holiday in the South West in is the region of 1.25 million.

3.34 It also seems reasonable to assume an approximate two thirds/one third split between off-road cycling and cycle touring respectively; giving approximately 750,000 off-road cycling trips in the region.

3.35 No data is presented in relation to the location of off-road cycling; therefore, the amount of off-road cycling undertaken in woodlands will be a subset of the total off-road cycling figure.

3.36 These numbers appear at face value to be somewhat 'light' especially when the Camel Trail alone recorded figures of 285,000 trips as long ago as 1997. It is believed that the UKTS data therefore understates the actual number of cycling activity trips taken as part of a holiday trip in the South West.

Estimates of Cycling as the Main Purpose of a Holiday Trip

3.37 In 2003 UKTS reported that 100,000 holiday trips were made to the South West where cycling was the main purpose of the trip.

3.38 This figure is a subset of the main cycling activity data. It is not split between off-road cycling and cycle touring although it seems reasonable to assume the same proportions which would equate to approximately 66,700 trips where off-road cycling was the main purpose of a staying holiday trip.

3.39 If we assume an average stay of 4 days with 1 cycling trip per day, this would equate to 266,800 separate cycling trips made by staying tourists where cycling was the main purpose of the trip.

Total estimate of demand based on GBDVS data

3.40 Using this data, it is apparent that in addition to the cycling trips made by residents, there are approximately a further 1 million cycling trips made to woodlands in the region by the staying tourist population.

Summary of Current Demand

3.41 The estimate of the current overall resident and tourist off-road cycling trips in woodlands in the South West is between four million and eight million trips per annum. Of this total, one million trips per year are made by visitors staying in the region and between three million (based on GBDVS) and seven million (based on IMBA estimates) are by local residents.

Potential Future Demand

Potential Demand from the Local Population

3.42 All indications from research into off-road cycling demonstrate that the local population will provide by far the most significant proportion of users.

3.43 In order to assess the potential demand from the local population an approach has been developed based upon demographic profiling[15] of cyclists in woodlands in the South West. The Cameo proprietary model has been used for this exercise[16]. In essences the survey work undertaken as part of this study has been used to identify the types of people most likely to cycle in woodlands and then the Cameo data has been used to establish where these types of people live.

3.44 The profiling has been further used to identify 'gaps' between the demand for woodland cycling in the region and current provision of woodland cycling facilities. This has been done by identifying areas containing many potential woodland cyclists and comparing this with current supply in these areas. This comparison of demand and supply is detailed in the SW Cycling Cameo Data Map in this section. This map identifies the postal locations where there are above average numbers of cyclists and where cyclists are particularly well-represented ("best prospects").

Demographic Profile of Cyclists in the South West

3.45 Customer profiling is the analysis of a database of consumer postcodes using a number of classifications based upon population characteristics. This provides a spatial view of the volume and location of different customer types. It can be used to measure past performance and identifies those segments or users groups which are likely to the most responsive in the future.

3.46 In order to assess potential demand in the region a survey of cyclists was undertaken in woodlands throughout the region. Postcode data was captured from over 800 respondents and this data has been used to build a demographic profile of woodland cyclists in the South West.

3.47 The Cameo classification was used to profile respondents to the survey undertaken as part of this study. The classifications used are based largely on census results and linked to every household in the UK. This system uses a geo-demographic classification including age, family status, housing type and ownership, socio-economic status, qualifications, car ownership and occupation.

3.48 Modelling techniques have been used to define 58 discrete and relevant categories within the UK population and these have been clustered into 11 main 'marketing' groups. These have been tested and shown to be homogenous within their make-up, present in enough numbers to be of practical use and not biased toward specific geographic regions. Consumers are classified by analysing their home postcode and assigning them to a category. This system is used by a variety of businesses including the regional tourist boards in England. A full list of these categories and more information about profiling is in the appendix to this report.

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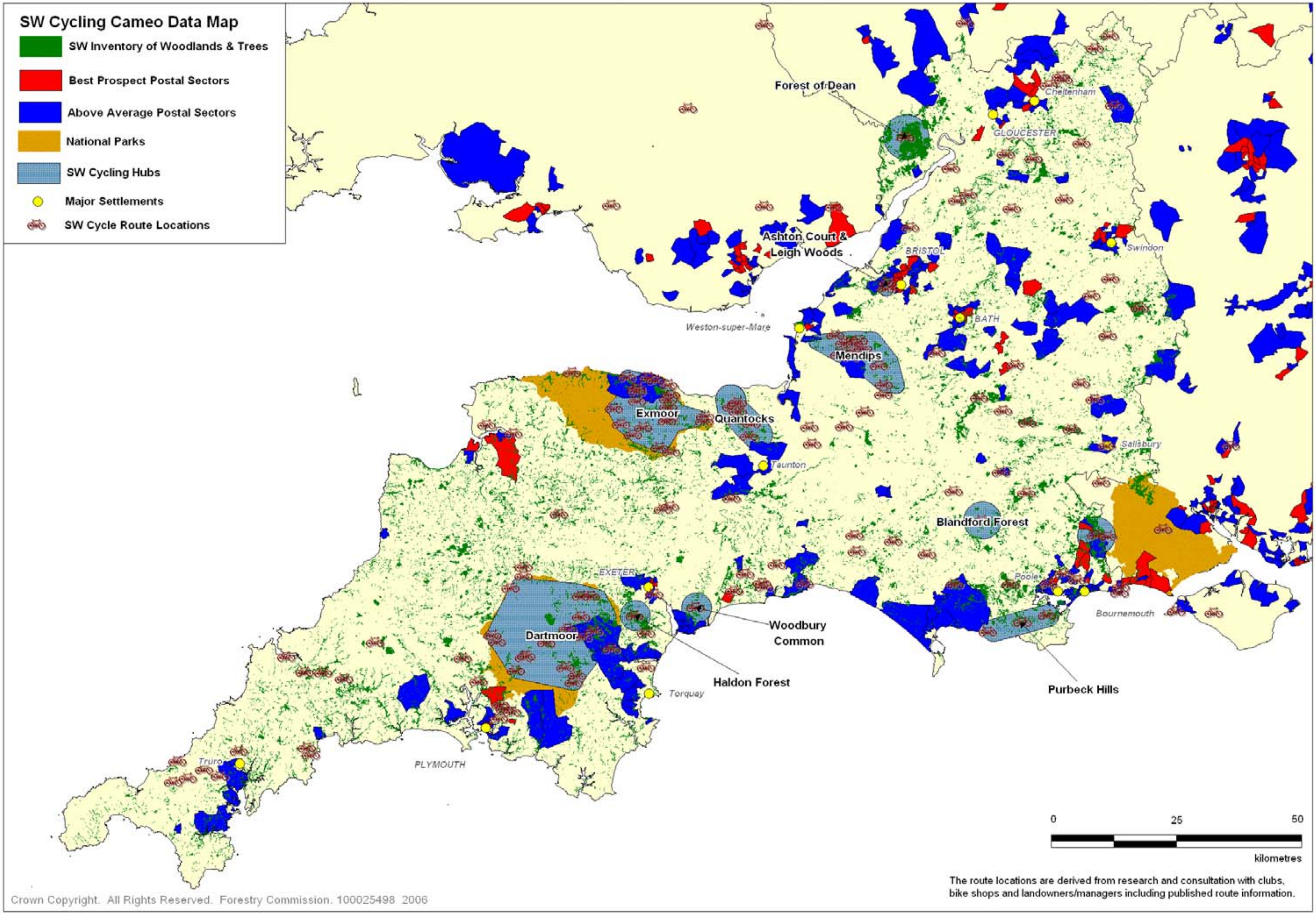
[15] Splitting people into categories based upon factors such as life stage, income, type of housing etc.
[16] http://www.eurodirect.co.uk/pages/CAMEO_UK.html



SW Cycling Cameo Data Map
SW Inventory of Woodlands & Trees
Best Prospect Postal Sectors
Above Average Postal Sectors
National Parks
SW Cycling Hubs
Major Settlements
SW Cycle Route Locations
Forest of Dean
Cheltenham
GLOUCESTER
Ashton Court & Leigh Woods
BRISTOL
Swindon
Weston-super-Mare
BATH
Mendips
Exmoor
Quantocks
Taunton
Salisbury
Blandford Forest
EXETER
Poole
Bournemouth
Dartmoor
Woodbury Common
Haldon Forest
Purbeck Hills
Torquay
Truro
PLYMOUTH
0
25
50
kilometres
The route locations are derived from research and consultation with clubs, bike shops and landowners/managers including published route information.

Interpreting the Results

3.49 To help highlight areas of particular significance within our South West Cycling Survey dataset, an index figure has been calculated by comparing the presence of certain groups found in the results in percentage terms against the percentage of these groups present on a South West regional level.

3.50 An index figure of 100 signifies that the proportion of people in any one group is the same as the proportion of households in that group in the catchment area. This is the expected result if there was a normal distribution of households represented in the sample data. An index of over 100 suggests that a group is represented at a higher proportion amongst cyclists surveyed than in the catchment population as a whole.

3.51 To further enhance the picture presented by the index, penetration profiles are developed taking into account the fact that different categories within each classification occur in the population in different proportions.

3.52 As the number in the survey dataset is quite small compared to the region’s population, a Penetration by Count Profile is used to calculate proportions for each group relative to 100,000 households. This provides more usable figure for analysis.

Analysis of the South West Cycling Database

3.53 In terms of volume of records in the database, CAMEO UK groups 3, 4, 6 & 7 dominate the profile of cyclists interviewed in the study, accounting for over 70% of all cyclists interviewed. These groups are:

- Affluent Home Owning Couples & Families In Large Houses
- Suburban Home Owners In Smaller Private Family Homes
- Less Affluent Family Neighbourhoods
- Less Affluent Singles & Students In Urban Areas

CAMEO UK Group Analysis

CAMEO UK Groups	% in cyclist survey	Households in South West population	% of South West households	Customers per 100,000 households	Index
1 - Affluent Singles & Couples In Exclusive Urban Neighbourhoods	1.25	14,377	0.65	55.64	193
2 - Wealthy Neighbourhoods Nearing & Enjoying Retirement	4.22	93,371	4.19	28.92	100
3 - Affluent Home Owning Couples & Families In Large Houses	16.25	354,406	15.9	29.34	102
4 - Suburban Home Owners In Smaller Private Family Homes	24.84	391,719	17.58	40.59	141
5 - Comfortable Mixed Tenure Neighbourhoods	8.59	194,057	8.71	28.34	98
6 - Less Affluent Family Neighbourhoods	15.16	390,569	17.52	24.84	86
7 - Less Affluent Singles & Students In Urban Areas	13.12	120,110	5.39	69.94	243
8 - Poorer White & Blue Collar Workers	7.81	294,515	13.21	16.98	59
9 - Poorer Family & Single Parent Households	7.34	300,400	13.48	15.65	54
10 - Poorer Council Tenants Including Many Single Parents	1.09	65,934	2.96	10.62	36
11 - Communal Establishments In Mixed Neighbourhoods	0.31	9,342	0.42	21.41	74
Total	100%	2,228,800	100%		

3.54 The ‘top-ten’ categories with the most significant index values are shown below. Most notably, *Wealthy singles in small city flats and suburban terraces* are almost eight times as likely to be amongst cyclists interviewed than the regional average.

Top 10 categories in the sample of cyclists in the South West

Category	Description	Index Value
1B	Wealthy singles in small city flats and suburban terraces	783
7D	Young singles couples and students in urban areas	462
7E	Young singles in privately rented & housing association properties	352
5B	Younger and older single mortgagees and renters in terraces and flats	315
4A	Executive households in suburban terraces & semis	262
4E	Couples & families in modern rural and suburban developments	188
5A	Singles, couples& school aged families in mixed housing	167
4F	Mature couples and families in mortgaged detached & semis	146
7A	Single mortgagees & renters in pre-school family neighbourhoods	141
6B	Older & mature households in suburban semis & terraces	128

3.55 These 10 categories represent 37% of customers in the database and 17% of the base South West household population.

3.56 It is clear from this analysis that 83% of the base population in the South West are under-represented, highlighting some significant issues with regards to the social inclusiveness of the activity within the region.

3.57 To illustrate this point of inclusiveness, the table below lists the categories with the lowest index scores where there is a significant household base in the region.

Categories in the sample of cyclists in the South West with the lowest index

Category	Description	Total Base Households	Index Value
9E	Poorer couples & school age families in terraced & semis	105,706	82
6G	Young single & family communities in small terraces & rented flats	98,005	39
9A	Poorer singles in outer suburban family neighbourhoods	82,868	37
9B	Poorer singles & families in mixed tenure	74,845	55
8E	Mixed mortgagees & council tenants in outer suburbs	58,548	53

3.58 It is possible to make an estimate of the number of households in the South West whose members are of groups and types which have a higher than average representation in the sample of cyclists.

3.59 This enables us to make a crude estimate of the total number of people who might be most likely to be encouraged to take part in recreational off-road cycling in woodland in the region if all other constraints were tackled successfully.

3.60 Assuming that households with an index in the cyclist survey population of over 150 are potential off-road cyclists and assuming an average household population of the region of 2.3 then the potential market size in the region can be estimated at 435,547 as shown below .

Estimated potential Market Size for Off-Road Cycling in Woodlands in the South West

Category	Description	Index Value	Total households in the South West	Total population in the South West (estimated)
1B	Wealthy singles in small city flats and suburban terraces	783	3,111	7,155
7D	Young singles couples and students in urban areas	462	36,145	83,134
7E	Young singles in privately rented & housing association properties	352	4,937	11,355
5B	Younger and older single mortgagees and renters in terraces and flats	315	24,271	55,823
4A	Executive households in suburban terraces & semis	262	57,032	131,174
4E	Couples & families in modern rural and suburban developments	188	53,489	123,025
5A	Singles, couples & school aged families in mixed housing	167	10,383	23,881
TOTAL			189,368	435,547

3.61 Some care should be taken over the use of this estimate as the demographic profiling exercise was based on what is still a relatively small sample size of post codes and uses a relatively crude extrapolation. Continued data capture of postcodes is strongly recommended in order to build the database so that an even more robust analysis can be developed in future. This estimate of potential demand among the base population within the region can be further enhanced by estimating the potential number of cycling trips made by each individual – this would give an estimate of the potential total number of trips that could be made by the base population within the South West.

3.62 From the survey data it is apparent that a majority of cyclists interviewed classify themselves as regular cyclist. Combining this information with IMBA estimates it is apparent that the number of trips made per cyclist could conservatively range between 15 and 24 trips per annum.

3.63 This would give an estimated potential annual number of cycling trips from these core categories within the base population in the South West of between **6.8 million and 10.5 million trips.**

3.64 It is important to note that the potential number of cycling trips to woodlands in the South West is considerably higher than this if cycling trips from CAMEO categories that have a lower representation in the survey are added in. It is likely that these categories will include a significant proportion of less frequent novice and family cyclists and these groups represent the greatest opportunity to increase the demand for off-road cycling in woodlands across the region.

3.65 The actual demand that could be stimulated is a function of supply side provision combined with the effectiveness of any marketing activity to both raise awareness of and stimulate use of this supply side provision.

3.66 The CAMEO segmentation will provide a significant input into the targeting of any subsequent marketing communication activity to stimulate demand as it clearly highlights both those segments that demonstrate a propensity to take part in woodland cycling as an activity and those segments that do not.

Potential Demand from the Tourist Population

3.67 It is not considered possible to estimate any additional potential demand from the tourist population without further research within this particular audience group.

3.68 However, it is possible to consider the volume and spatial distribution of the staying tourist population within the region as an indication at a generic level of the potential audience available for any location offering off-road cycling in woodlands and this is noted within the maps forming part of this section of the report. However, it is recommended that further research to estimate the potential demand among the tourist population should be undertaken.

3.69 We have already estimated (using UKTS data) that there are approximately 683,300 current off-road cycling trips in the region each year made by staying tourists as an activity whilst on holiday, plus an estimated 266,800 off-road cycling trips by the 66,700 main purpose holiday visits. This gives a combined total of approximately 950,000 off-road cycling trips made by staying tourists in the region each year.

3.70 There is an apparent correlation between some elements of the CAMEO UK Categories identified as having the highest density in the cycling population and the South West Tourism brand cluster type 'It's Adventure'.

3.71 Based on UKTS data, it is estimated by South West Tourism that this cluster makes approximately1.3 million trips to the region per annum with an associated value of £256.4m. Given the links between this cluster and woodland off-road cycling there is clearly room to grow within this cluster alone, plus the 'Close to Nature' and other cluster visitors.

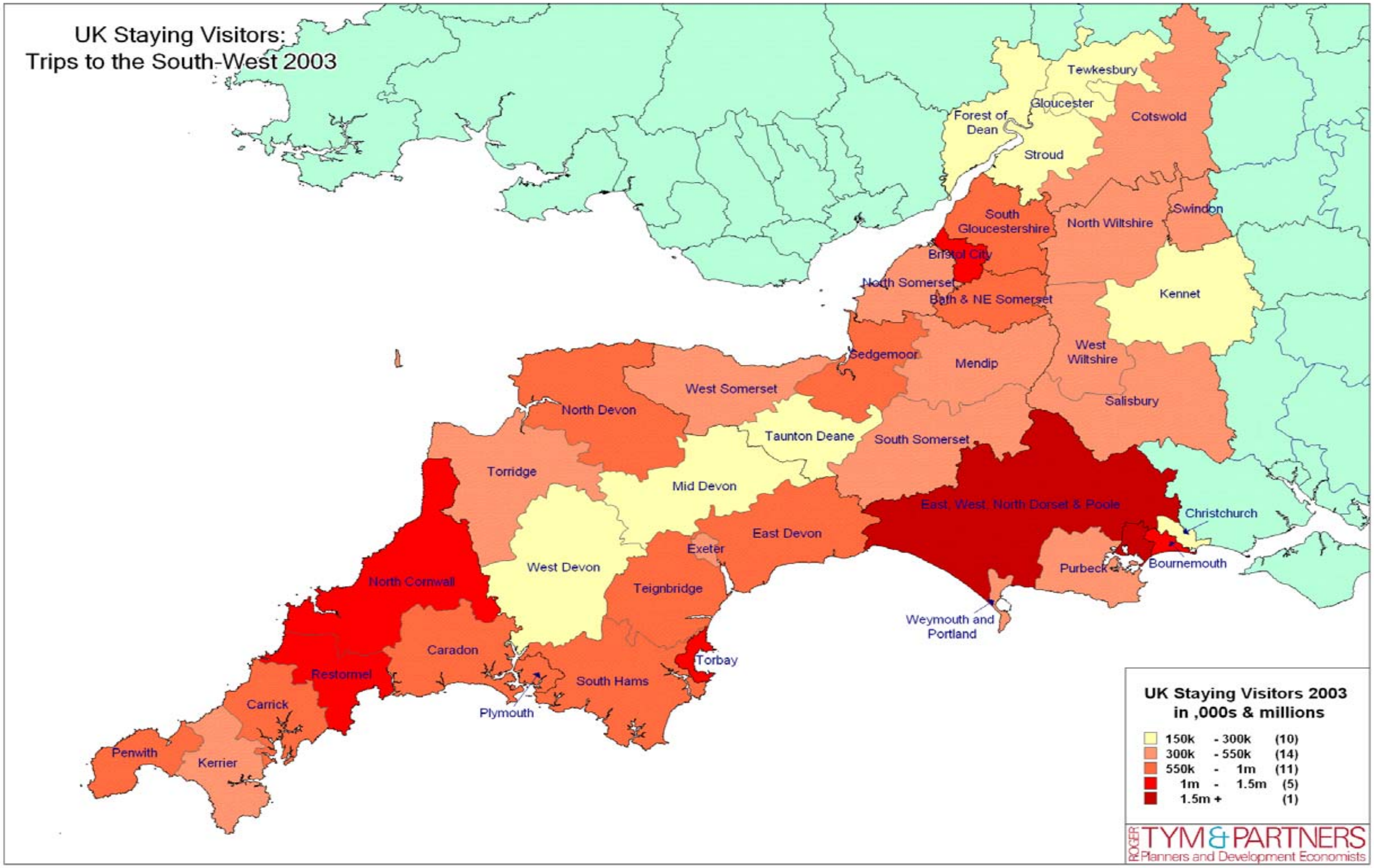
3.72 This is without any additional tourists that could be attracted to the region as a result of good supply side provision and strong marketing. Clear lessons can be learnt from the experiences of 7Stanes in Scotland and a number of different mountain biking centres in Wales. Through increased supply-side provision and effective marketing, it is apparent from these examples that significant additional off-road cycling demand can be stimulated.

Spatial Distribution

3.73 The following maps show the geographic distribution of the staying visitor population in the South West and the relationship between the best prospect segments of the resident population in comparison to cycling hubs discussed earlier in the document.

3.74 The tourism data does not disaggregate all of the Dorset districts and this over-emphasises their performance. Apart from Dorset, the main concentrations of visitors are in Restormel/North Cornwall, Torbay, Bournemouth and Bristol. Bristol is likely to have a higher proportion of business tourism. Comparing the visitor populations and the cycling hubs indicates that the Cornish visitors are under-served

3.75 The comparison between the resident population best prospect sectors and the cycling hubs detailed in the SW Cycling Cameo Data Map suggests that the area around Truro and to a lesser extent, the north east and south east section of the region are both underserved.


UK Staying Visitors:
Trips to the South-West 2003
Tewkesbury
Gloucester
Forest of Dean
Cotswold
Stroud
South Gloucestershire
North Wiltshire
Swindon
Bristol City
North Somerset
Bath & NE Somerset
Kennet
Sedgemoor
Mendip
West Wiltshire
West Somerset
North Devon
Salisbury
Taunton Deane
South Somerset
Torridge
Mid Devon
East, West, North Dorset & Poole
Christchurch
East Devon
Exeter
Purbeck
Bournemouth
West Devon
North Cornwall
Teignbridge
Weymouth and Portland
Caradon
Torbay
Restormel
South Hams
Plymouth
Carrick
Penwith
Kerrier
UK Staying Visitors 2003
in ,000s & millions
150k - 300k (10)
300k - 550k (14)
550k - 1m (11)
1m - 1.5m (5)
1.5m + (1)
ROGER TYM & PARTNERS
Planners and Development Economists

Summary

3.76 In terms of estimating the current level of demand for cycling in the region's woodlands, the true figure lies somewhere between 4 million trips per year, as estimated using GBDVS data and 8 million trips per year, as estimated using the IMBA approach. Using either method, the current demand level appears to be significant.

3.77 The latent potential demand from within the both the local population and from the tourist population also appears to be considerable. The estimated potential demand from the core user groups in the local population alone is between 6.8 and 10.5 million trips per year.

3.78 Added to this can be considerable potential demand from non-core user groups, particularly occasional and family cyclists, who live nearby and who could be attracted by increased supply side provision of cycling resources matched to their needs combined with effective marketing.

3.79 There is however a large percentage of the local population that do not currently participate in woodland cycling as an activity. The reasons for their exclusion need to be better understood in order that a more inclusive programme can be delivered where this is a key objective.

3.80 The spatial distribution of current supply and estimated potential demand from both the local and tourist populations suggests that Cornwall is underserved with cycling hubs. Furthermore, the north east and south east of the region both offer demand potential to develop more facilities.

4 WOODLAND OFF-ROAD CYCLING LOCATIONS

Introduction

4.1 This section reviews off-road cycling locations in woodlands in the South West. The information is drawn from published and unpublished sources, supplemented by interviews with the Forestry Commission, bike clubs, AONB managers and landowners:

- Over 100 cycling clubs were contacted after sourcing names from websites, magazines and other consultees. Over 60 clubs responded with information
- A limited number of bicycle hire enterprises were interviewed across the region. These tended to be in locations well used by a general market, such as the Camel Trail
- Over 10 South West based companies offering guided mountain bike breaks were interviewed
- Books, magazines, leaflets and website forums were used to add to the list of mountain biking locations. Some magazines offered specific route listings and publications writers were also helpful in offering other useful contact details. Internet forums were also useful in picking up popular routes
- All the AONB's (13) and National Parks (2) across the South West have been consulted. Almost all the Area Foresters across the region have been contacted.
- Over 40 local authority officers were contacted. The responsibility for off-road cycling fell under the remit of the transport team in some areas and the tourism or leisure team in others. The response from this group was limited with a significant proportion of officers indicating that off road cycling was outside their remit (despite considering on road cycling within their responsibilities). Others have indicated that the AONB or National Park officers were more relevant. Much of the response from this group referred to family trails and on-road routes

4.2 Further information about the main woodland cycling locations is in Appendix 8.

Locations

4.3 In total over 200 locations were identified through our consultation exercise, noted on the maps later in this section of the report. Whilst most are bridleway trails and permissive paths, the list also includes a number of locations which are popular with families e.g. Granite Way and the Camel Trail. These routes are often old railway routes or tracks adjacent to canals/rivers which offer safe, relatively level cycling for a general market.

4.4 The locations have not been subject to any independent verification about their suitability for off-road cycling, such as whether the locations mentioned by cyclists have the necessary landowner permissions or whether there are impacts on sensitive areas.

4.5 The amount and type of woodland varies between locations. While some of the specific locations are solely woodland, other larger areas combine different land uses. However, all are defined by the users or managers as including a significant woodland component.

4.6 Through this exercise it is believed that all the major locations have been identified. However the there is likely to be an additional tier of informal less-frequently used woodland cycling locations that have not been captured.

4.7 It is possible to group some of the most popular locations into relatively cohesive areas, which we have termed "Woodland Cycling Hubs". These Hub locations are:

i) Dartmoor

ii) Haldon

iii) Woodbury

iv) Exmoor

v) Quantocks

vi) Mendips

vii) Ashton Court

viii) Blandford Forest

ix) Purbeck

x) Forest of Dean

xi) Moors Valley

4.8 These Hubs are discussed below with a more detailed description provided in the appendices.

4.9 In addition to the 11 Hubs noted above, the current developments in the Tamar Valley as a part of the Tamar Valley Mining Heritage Project will deliver a significant woodland-based cycling destination. Once complete, this new facility has the potential to provide an additional cycling hub within the region.

4.10 The classification of off-road cycling locations into Hubs is used to provide an analysis framework, particularly when considering how the main supply fits with the main demand. However, identifying locations as Hubs does not necessarily mean that future development should necessarily be based on these locations or that there is no potential for other locations.

Hubs

4.11 The Hubs are located across the region although the south west corner is poorly represented other than Dartmoor, with no Hubs in Cornwall. There is also relatively little provision within parts of the north east of the region despite the potential demand from urban settlements such as Swindon, Gloucester and Cheltenham. Bristol is served by Ashton Court and the Forest of Dean and the Forest of Dean also serves Gloucester and Cheltenham.

4.12 The M5 corridor is well endowed with Hubs. The Mendips, Quantocks, Exmoor, Haldon and Woodbury Common are all easily accessible from the M5.

4.13 To the south east of the region there are two Hubs; Blandford Forest, Moors Valley and Purbeck.

4.14 Within the 11 Hubs identified, it is possible to further classify the locations into "Geographic Hubs" and "Focal Point Hubs":

- Geographic hubs have been identified where there are a number of cycling locations/routes within a discrete area e. g. Dartmoor, Mendips.
- Focal point hubs comprise clearly identifiable centres for off-road cycling e.g. Haldon Forest Park

Geographic Hubs

Dartmoor

4.15 Dartmoor offers a large range of mountain biking though most is concentrated around the edge of the moor as the bridleway network is more fragmented on the open high moorland. Dartmoor National Park covers an extensive area including National Nature Reserves, SSSI's and a number of major conifer plantations.

4.16 Exeter, Plymouth, Newton Abbot, Torquay and Okehampton provide a potential mountain biking audience close to the moor. Whilst road access is good via the A30 and A38, public transport options are limited. An exception is the Dartmoor Freewheeler bus cycle service, which provides car-free access to the moor for cyclists.

4.17 It is understood that mountain biking on the moor has stabilised over recent years although the volume of use and rate of change cannot be quantified. The area continues to feature in specialist cycling publications and off-road cycling maps and guide books.

4.18 Whilst some areas of the Park are clearly more environmentally sensitive than others, there have been few reported problems with either capacity issues or environmental damage. The National Park Authority is keen to address the fragmented bridleways and is seeking opportunities to open up new areas as part of the network.

Exmoor

4.19 Although Exmoor is one of the smaller National Parks, the varied topography and comprehensive bridleway network has prompted interest from off-road cyclists. Off-road events include the Exmoor Explorer.

4.20 The area is popular with visitors from Bristol, Exeter and Taunton. Exmoor itself is sparsely populated so demand for cycling in the area is either from the neighbouring settlements or visitors staying in the area. Access to cycling locations within the Park is primarily by private vehicle as the public transport network is limited and difficult for those bringing bicycles.

4.21 The honey pot locations of Dunkery Beacon and Tarr Steps are under particular pressure from visitors and the National Park Authority has recommended that these areas are not used for cycling to avoid conflict between cyclists and other users. The National Park Authority has produced literature noting that mountain biking does pose potential problems and that overuse and conflicts of interest between users, including horse riders and cyclists, will need to be managed.

4.22 Despite these concerns regarding overuse at a few specific locations, it is understood that with good management Exmoor could accommodate more cyclists. Marketing and information could be used to direct cyclists to the most suitable locations as well as facilitate overall growth in off-road cycling. Within the area, opportunities for further off-road cycling include Croyden Hill, owned by the Forestry Commission, and Combe Sydenham, a private estate on the east of Exmoor.

Quantocks

4.23 The Quantocks are an AONB and include an area of Ancient Woodland as well as a major Forestry Commission plantation on the eastern side of the AONB. Taunton and Bridgewater are the closest large settlements but the Quantocks are also easily accessible from Bristol, Bath and Exeter.

4.24 Although the Quantocks are the smallest Geographic Hub, a high density of bridleways and favourable mountain biking has attracted considerable demand from enthusiast off-road cyclists, even without formal promotion.

4.25 In general the quantum of riders has caused relatively few problems although there have been isolated capacity and conflict of interest issues. The AONB Service has used consultation between user groups to resolve these issues.

4.26 Great Woods within the Quantocks have been identified as offering potential for more off-road cycling.

Mendips

4.27 The Mendips are popular for mountain biking and home to high profile events such as the Cheddar Challenge and Clic 24. Consultations indicate that the most popular areas for informal cycling within the Mendips are Rowberrow Warren and Black Down.

4.28 The bridleway network across the Mendips is fragmented although where the bridleways are good, the concentration of use has resulted in some capacity issues. There are also environmental issues at Black Down and Rowberrow Warren, where usage is eroding thin soils and a number of cyclists are using unauthorised areas. The AONB Service has recently installed counters as part of the strategy to assess and manage these problems.

4.29 The AONB Service has produced a trail guide which outlines authorised routes within the area, in line with the IMBA grading system[17]. Part of the objective for the guide is to direct users towards authorised routes and away from the more sensitive locations.

4.30 The Mendips are located close to several large urban centres – Bristol, Bath and Weston-super-Mare are all within an hours drive but, in common with many other Hubs, public transport access to cycling locations is difficult.

4.31 The area clearly has the scope to provide a variety of mountain biking although at present there are problems with the fragmented bridleway network and consequently pressures on accessible and sensitive areas. A larger network and directing users to particular localities may ease pressures. East Harptree, Stockhill and Rowberrow have been identified as suitable cycling locations to relieve pressure on other areas.

Purbeck

4.32 The Isle of Purbeck comprises an attractive environment, parts of which have been designated AONB, SSSI, Heritage Coast and World Heritage Site. The ridge provides the 'backbone' of the area and the heathland, woodland and the large number of bridleways mean that the area is popular with mountain bikers.

4.33 Although the main road access is circuitous from nearby Poole and Bournemouth, access by rail is possible and there is a ferry from Poole to Purbeck.

4.34 The Council has taken a proactive stance to the provision of cycling which has benefited the growth of on and off road cycling routes – the Sika Trail and Rempstone Ride are both local supported routes. Overall riding in the area is categorised as non-technical although some bridleways cover steep hills and tracks. As a result, the area caters for a wide market from families to experienced riders.

4.35 There are some tourist honey pots within the Isle and its general popularity with visitors mean that the area is fairly well provided for in terms of parking facilities and refreshment opportunities. Whilst the Purbeck Management Plan notes that conflict between recreational users is a potential issue within the area, there is more scope for mountain biking in areas less used by walkers and other visitors.

Woodbury

4.36 Woodbury Common is part of the East Devon Area of Outstanding Natural Beauty and encompasses seven 'commons' within 2,800 acres, all of which allow public access. In addition to public rights of way there are also 10 miles of permissive paths.

4.37 The rolling topography and mix of heath and woodland trails provides potential for recreational, family and experienced mountain biking opportunities. However the lack

[17] Trails are graded using standard criteria in the same way as ski runs, with black the hardest

of waymarked trails deters some family and less experienced riders and as a result it is likely that most of the use is by local enthusiasts.

4.38 The East Devon Pebblebed Heath is a SSSI and in addition is a Special Area of Conservation. The Special Protection Area status is also applicable to parts of the Common. However it is understood that the pebblebed heath tracks are relatively robust and may be suitable for cycling. The environmental impacts of cycling development should be considered in consultation with Natural England.

4.39 The relatively large catchment population, suitable environment and potential attractiveness to a range of mountain biking abilities mean that there may be potential to increase the use of the Common.

Focal Centres

Haldon

4.40 Haldon Forest Park offers 25km of trails within a Forestry Commission owned site. It opened in 2006 but has already received good reviews and growing demand. The area has a long standing local reputation as a popular cycling and recreational base but the opening of this centre has increased the profile of the site significantly, particularly amongst a broader market.

4.41 The centre has developed a range of cycle trails pitched to all levels of ability although the trails suitable for less experienced riders probably receive the bulk of use – the black route is particularly challenging and suitable only for very experienced riders.

4.42 The centre is located very close to Exeter, with Torbay and Plymouth also relatively close. A traffic-free route for cyclists has been developed from Exeter. Early indications are that the centre's usage is likely to be higher than anticipated.

4.43 Current facilities include a pay and display car park, toilet and shower facilities, an arts centre (Centre for Contemporary Art and the Natural World), children's play area and a food and drink vendor at weekends. The SW Peninsula Forestry Commission office is also located at the site.

4.44 Provision of dedicated cycling tracks has reduced conflicts between walkers, cyclists and horse riders. While some of Haldon is a SSSI, the use of trails directs people away from the more sensitive areas. The higher than anticipated use of the trails may have an impact on trail maintenance.

4.45 Continued interest in the centre will provide opportunities for increasing the potential of the site. Provision of a bike wash facility, a more permanent refreshment facility, bike shop and more trails are all potential future options.

Ashton Court

4.46 The Ashton Court Estate is a historic estate covering 850 acres of woodland and grassland orientated towards a broad set of users including cyclists. The Estate offers a network of cycling trails with the Avon Timberland Trail the main waymarked off-road mountain bike trail. The Timberland Trail is designed for inexperienced riders though an additional section caters for more enthusiast riders. In addition surfaced trails in the adjacent Leigh Woods provide good family cycling.

4.47 The main entrance to the Ashton Court is close to Bristol city centre, providing the site with a large catchment population. The site also has access from the M5.

4.48 Facilities for cyclists at the site are offered as part of the general visitor facilities provided for the estate. This includes some informal parking, a visitor centre, a café and toilets.

4.49 Formalisation of the trails (including the development of The Timberland Trail) and production of maps and leaflets has reduced conflicts within the area between mountain bikers and other users.

4.50 The wide variety of users at Ashton Court means that any further development of mountain biking would have to compete with other activities such as events and general pedestrian use. The estate is also in the process of implementing projects aimed at other markets and currently does not see mountain biking as a priority.

Blandford Forest

4.51 The Blandford Forest site includes a facility developed by a club at Okeford Hill as well as a network of footpath and bridleways used by the general public. The Okeford Hill facility has manmade downhill trails maintained and ridden by a club which has an arrangement with the Forestry Commission. Other than a car park, Okeford Hill has few facilities and users bring their own refreshments.

4.52 Due to its steep topography the area developed as an informal cycling location that has now been formalised though agreements with the landowner. Membership of the club is necessary in order to ride the club trails. Overall the site is very popular with experienced riders who travel from up to one hour drive away. This includes the settlements of Poole, Bournemouth, Weymouth, Shaftesbury and Gillingham. Road access to the site is fairly good and there is also a link with the National Cycle Network.

4.53 Promotion of the site has been undertaken through specialist magazines and the Internet, and membership of the club has grown.

4.54 Future plans for the site are beginning to be developed and ideas include the expansion of trails and facilities. Car parking may be developed further in order to accommodate both the high number of users on event days and unrelated pedestrian users.

Moors Valley

4.55 Moors Valley Country Park covers about 250 acres and receives about 750,000 visitors a year. The Country Park is a multi-activity centre and includes walks, a steam railway, golf, play areas and a "go-ape" tree-top adventure facility.

4.56 Cycling at Moors valley is orientated towards general and family cyclists taking relatively short rides through the forest. There is a central two mile circuit and three additional loops which extend the trail to six miles. In addition to the way marked trails there are other tracks suitable for cycling. There is also a well-used cycle hire facility.

4.57 Ranger-led cycling events are organised for adults and children. These include a beginners' course to help inexperienced cyclists, short routes of around six miles and half day bike rides in the wider countryside of up to 15 miles.

4.58 The Country Park includes a visitor centre with restaurant, shop and exhibition area. The mix of facilities helps to maintain the substantial visitor numbers and maintain a viable business model for the Country Park. The Country Park is managed by the Forestry Commission and East Dorset District Council.

Forest of Dean

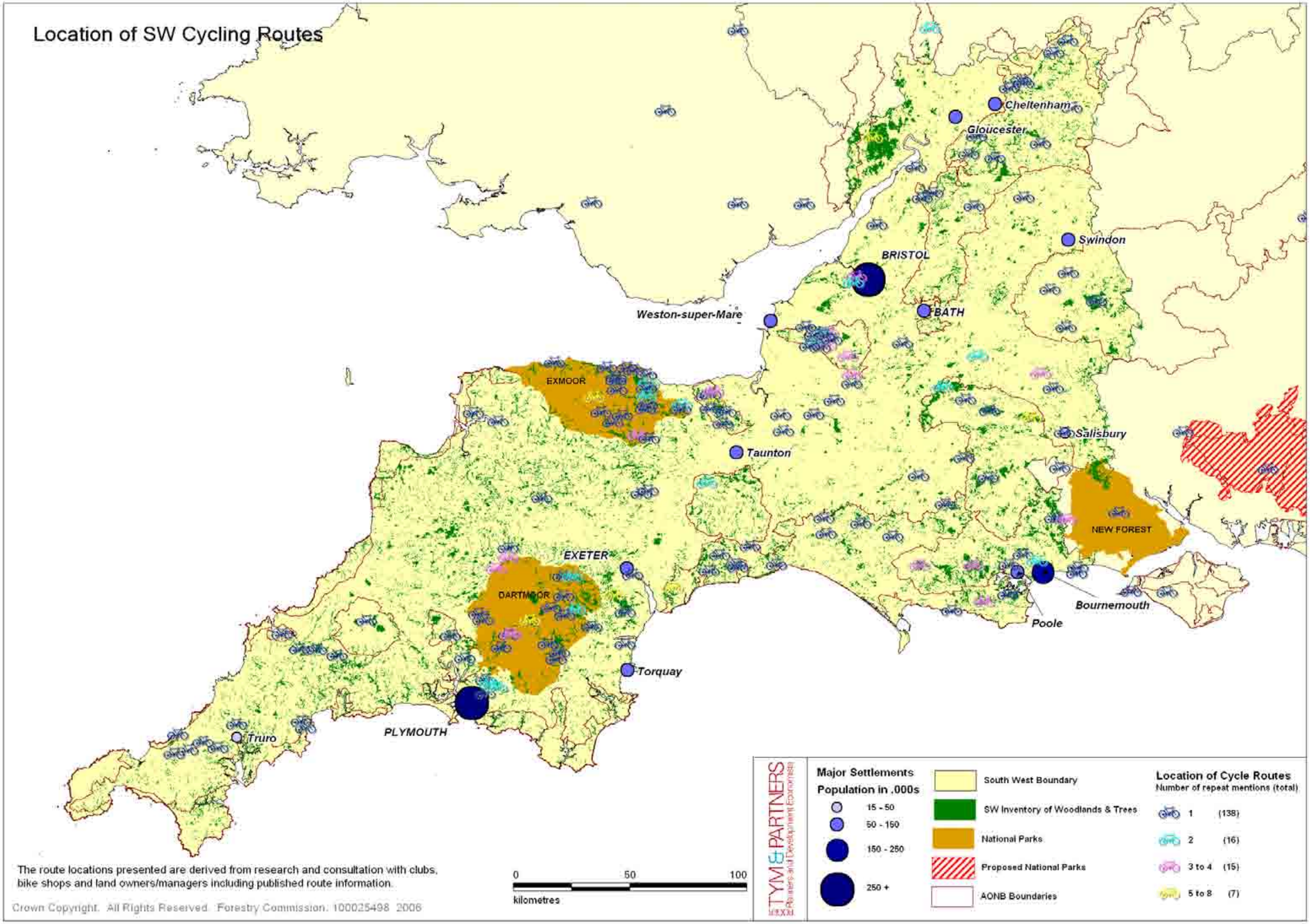
4.59 Cycling within the Forest of Dean is generally on a permissive basis using a network of stone tracks, with few bridleways. The majority of routes are suited to a general cycling market with a three mile red run for enthusiasts. Although the Forest is 35 square miles, cycle use is restricted by the lack of bridleways and the location of permissive paths.

4.60 The Pedalabikeaway Centre at Cannop is the main focus for cycling activities. It is served by a pay and display car park and has trail information, bicycle hire, refreshments and toilets, a cycle shop and bike wash. A 12 mile circular route is way marked and suitable for the general market and there is a network of paths and fire roads used by cyclists.

4.61 The Forest of Dean serves local settlements such as Coleford, Cinderford, Lydney and Monmouth as well as Bristol, Gloucester and Cheltenham. Although there is a rail link to Lydney, survey work indicates that 97% of visitors access the Forest by car.

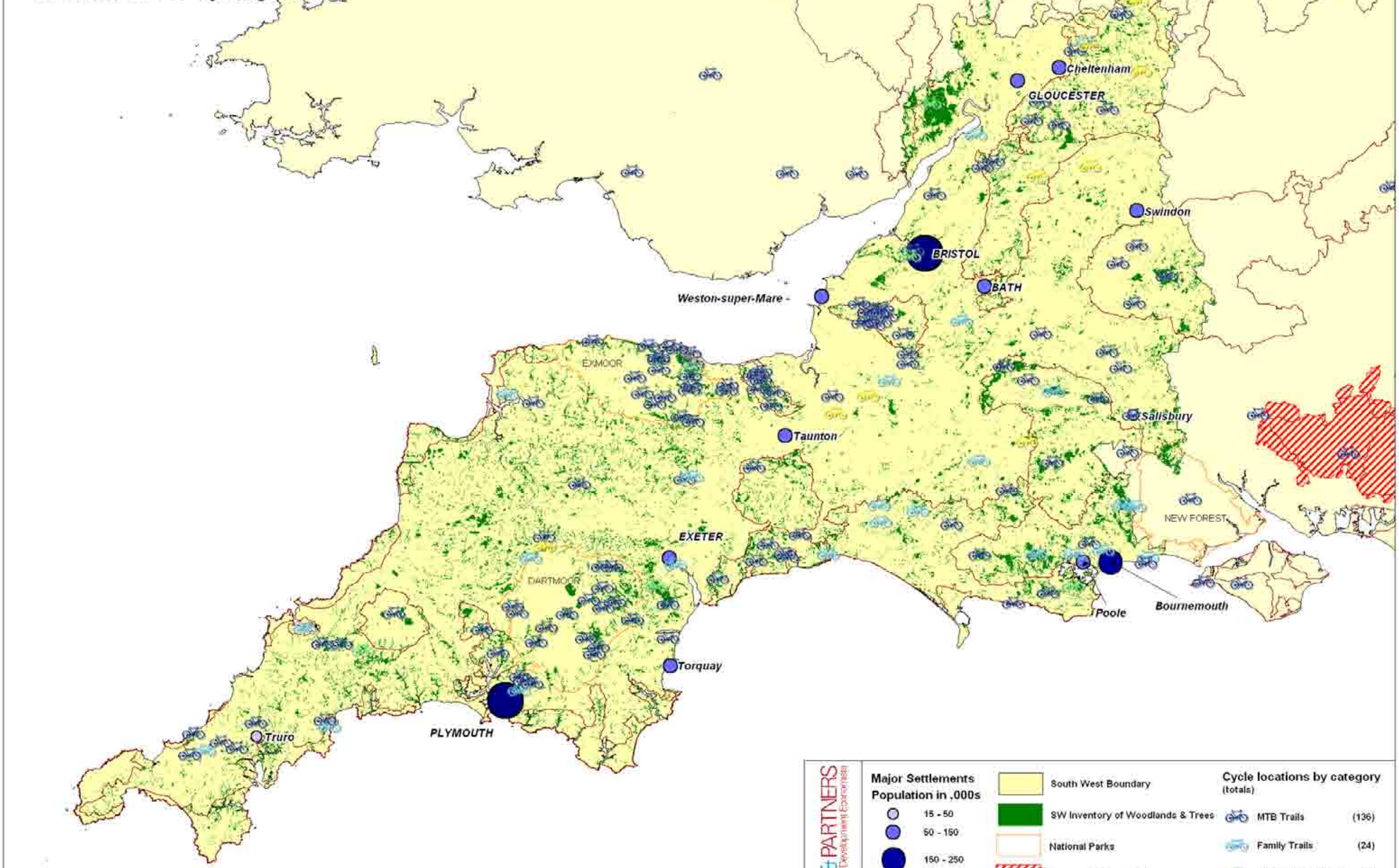
4.62 While the Forest is used by a variety of visitors, survey work indicates that 14% have cycling as the main purpose of their trip and 22% will cycle within their general leisure visit.

4.63 The opportunities for increasing use are linked to opening up more areas of the Forest for cyclists and allowing the general and technical trail network to evolve.

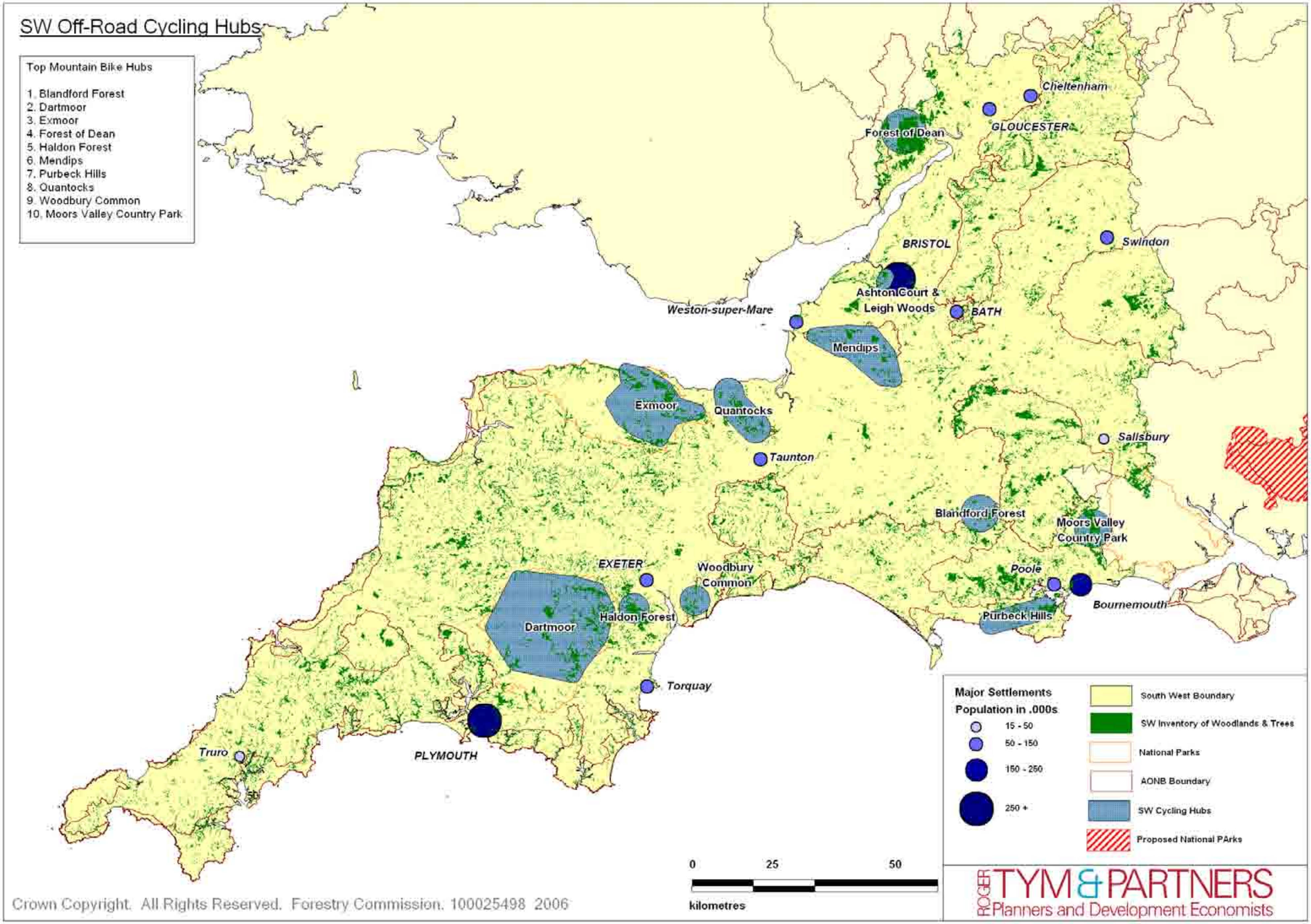


Location of SW Cycling Routes
Cheltenham
Gloucester
Swindon
BRISTOL
BATH
Weston-super-Mare
EXMOOR
Salisbury
Taunton
NEW FOREST
EXETER
DARTMOOR
Bournemouth
Poole
Torquay
Truro
PLYMOUTH
TYM & PARTNERS
Planners and Development Economists
Major Settlements
Population in .000s
15 - 50
50 - 150
150 - 250
250 +
South West Boundary
SW Inventory of Woodlands & Trees
National Parks
Proposed National Parks
AONB Boundaries
Location of Cycle Routes
Number of repeat mentions (total)
1 (138)
2 (16)
3 to 4 (15)
5 to 8 (7)
0
50
100
kilometres
The route locations presented are derived from research and consultation with clubs, bike shops and land owners/managers including published route information.
Crown Copyright. All Rights Reserved. Forestry Commission. 100025498 2006

Location of SW Cycling Routes



The route locations presented are derived from research and consultation with clubs, bike shops and land owners/managers including published route information.


SW Off-Road Cycling Hubs
Top Mountain Bike Hubs
1. Blandford Forest
2. Dartmoor
3. Exmoor
4. Forest of Dean
5. Haldon Forest
6. Mendips
7. Purbeck Hills
8. Quantocks
9. Woodbury Common
10. Moors Valley Country Park
Cheltenham
GLOUCESTER
Forest of Dean
BRISTOL
Swindon
Ashton Court &
Leigh Woods
BATH
Weston-super-Mare
Mendips
Exmoor
Quantocks
Salisbury
Taunton
Blandford Forest
Moors Valley
Country Park
EXETER
Woodbury
Common
Poole
Haldon Forest
Bournemouth
Dartmoor
Purbeck Hills
Torquay
Truro
PLYMOUTH
Major Settlements
Population in .000s
15 - 50
50 - 150
150 - 250
250 +
South West Boundary
SW Inventory of Woodlands & Trees
National Parks
AONB Boundary
SW Cycling Hubs
Proposed National PArks
0
25
50
kilometres
ROGER TYM & PARTNERS
Planners and Development Economists

Events

4.64 Off-road cycling events are undertaken at a variety of the cycling locations identified. These are at a variety of scales and include competitions such as the Exmoor Explorer, Mallets Bash on Woodbury and surrounding woodland areas, the Cloud Cover downhill series in Combe Sydenham and Soggy Bottoms at Newnham Park near Plymouth.

4.65 These events raise the profile of off-road cycling locations, primarily amongst the enthusiasts market. They can also raise the technical standard of the sport for participants as well as providing a focus for the cycle clubs who typically organise them.

4.66 There is the opportunity to use events to raise funds for clubs or host landowners through sponsorship, participant payments and catering etc. Many of the events held use the money raised for charitable purposes although they could use funds to develop facilities.

Summary

4.67 There are around 200 off-road cycling locations in woodland in the South West in current use. Of these there are 11 cycling Hubs, with a significant amount of use and with a profile to attract non-local riders. Of the 11 Hubs, six are *Geographic Hubs* (a concentration of locations within a specific area) and five are *Focal Point Hubs* (clearly identifiable centres).

4.68 The Hubs are:

Geographic Hubs

i) Dartmoor

ii) Woodbury

iii) Exmoor

iv) Quantocks

v) Mendips

vi) Purbeck

Focal Point Hubs

vii) Ashton Court

viii) Blandford Forest

ix) Haldon

x) Forest of Dean

xi) Moors Valley

4.69 The Tamar Valley has the potential to become an additional Focal Point Hub once work is completed on developing off-road cycle trails as a part of the Tamar Valley Mining Heritage Project.

4.70 There are no Hubs in Cornwall and few in the north-east part of the region.

4.71 There has been some recent and planned development in the Hubs and these have had an impact on the profile and use – for example the developments at Haldon Forest Park.

4.72 Although it has been possible to build up a picture of relative usage from user groups and land managers, it is clear that there is a dearth of hard quantitative data about the use of most off-road woodland cycling locations.

5 REGIONAL AND LOCAL ECONOMIC IMPACTS

Introduction

5.1 This section considers the economic impacts associated with off-road cycling at a regional scale and also illustrates the possible local level impacts that may be gained by reviewing evidence from Haldon Forest Park.

5.2 This section also reviews the commercial opportunities that may be available for public and private sector woodland landowners and managers.

Economic Impact

Regional Economic Impact

5.3 It is possible to estimate the total expenditure and employment in the South West economy associated with woodland cycling. This is based upon the overall demand estimates established earlier in the report of between four and eight million cycling trips per year in the South West, of which about 950,000 are by visitors staying away from home.

5.4 Certain assumptions are made as part of the analysis:

- As no break down exists to distinguish the number of trips that are part day or full day, it is assumed for this exercise that all trips are in effect full days
- That there are between 4 million and 8 million woodland off-road cycling trips per year, of which about 950,000 are by the 750,000 cycling staying visitors to the region and between 3,200,000 and 7,200,000 by local residents
- The 750,000 off-road cycling staying visitors includes the 66,700 trips made by holiday makers where cycling is the **main reason** for the holiday and 683,300 off-road cycling days trips made by staying visitors as a part of a **general** holiday trip
- For staying visits where cycling is the main purpose of the trip, no information exists for the average duration of the stay. It is assumed for this exercise that these are likely to be shorter breaks, for 66,700 staying holiday trips an average of 4 days per visit is assumed giving 266,800 staying nights
- The average cyclist expenditure is £12 for a day trip and £45 per day for a staying trip for staying users spend[18]
- For tourism trips where cycling is the main purpose the whole trip expenditure is counted as without the cycling the trip would not have been made. Where cycling has been undertaken as an activity on a general holiday, only the daily expenditure is counted, on the grounds that it is likely to be the primary activity for that day only[19]

5.5 These assumptions would benefit from being tested by further research in due course.

[18] 1996 Sustrans data adjusted to reflect current prices
[19] A fuller economic impact analysis may adjust these assumptions to take account of leakage, deadweight and displacement. However this would require further data to be collected beyond the scope of this study

Estimate of current spend associated with off-road cycling in woodlands in the South West

Audience group	*Type of trip*	*Estimated No. of trips / nights*	*Estimated Spend per trip / night (£)*	*Estimated Total Spend (£)*
Local Population	Full day trip	3,200,000 – Scenario 1	£12.00	£38,400,000
		7,200,000 – Scenario 2	£12.00	£86,400,000
Tourist Population	Cycling as main purpose	266,800 cycling-related nights	£45.00	£12,006,000
	Cycling as part of a general holiday	683,300 cycling-related nights	£45.00	£30,749,000

5.6 There are two scenarios for the local population impact presented in the table above, based on the range of use discussed above.

5.7 Scenario 1 indicates an estimated combined local population and tourist population total spend of **£81.2 million** and scenario 2 suggests a total of **£129.2 million**. The greater value from staying trips reduces the impact of the wide range of day cyclist estimates.

5.8 The 2003 Value of Tourism for the South West report indicates that at a regional level, one full time equivalent (FTE) job is directly supported for every £69,520.58 of day visitor spend and for every £55,514.84 of staying visitor spend. These are applied to the spend estimates to indicate the number of direct FTE jobs generated through woodland off-road cycling associated spend.

- Scenario 1 would produce 552 FTEs from day visit spend and 770 FTEs from the tourist/staying visit spend, giving a total of **1,323 FTEs** for the South West
- Scenario 2 would produce 1,243 FTEs through the day visits and the same 770 as a result of the tourist expenditure. This gives a total of **2,013** FTEs.

5.9 It is therefore estimated that the spend associated with off-road cycling in woodlands in the South West supports between 1,323 and 2,013 FTE jobs.

Local Economic Impact - Haldon Forest Park

5.10 The information available about Haldon Forest Park provides the opportunity to illustrate how economic impacts can take place at a more local level. The same principles can be applied to some of the other cycling locations although the varying quantity and profile of visitors will produce different impacts.

5.11 It is estimated that of the 50,000 visits to the number of cycling trips to Haldon Forest Park in its first 12 months of operation, 32,500 will be cyclists. Using this information it has been possible to estimate the associated off-road cycling expenditure and FTE jobs within a local area which are supported by this spend.

5.12 The survey undertaken as part of this study indicates that 3.7% of cyclists at Haldon are staying visitors (this includes people on holiday away from home and those visiting friends and relatives), and the other 96.3% are day visitors. Using the £12 per day visitor and £45 for staying visitors spend per trip figures it is possible to work out how much expenditure is associated with off-road cycling visits to Haldon.

5.13 Day visits make up 31,300 (96.3%) of the 32,500 cycling visits and with an average £12 spend per visit the total expenditure is £375,500.

5.14 The impact from staying visitors will depend on whether the cycling was the main purpose of trip or whether it was part of a general holiday.

- 150 of the trips to Haldon Forest Park were by staying visitors where cycling was the main purpose of the holiday. We have assumed that out of a four day trip, two of these days will have been at Haldon and the remaining two cycling elsewhere in the area. Therefore those people who cycled at Haldon as the main purpose of their trip will have spent around 300 nights in the area with a total spend of £13,500.
- Just over 1,000 of the trips to Haldon Forest Park were by staying visitors on a general holiday. Their daily expenditure of £45 per day totals £47,000

5.15 The overall expenditure attributable to Haldon is therefore:

- Expenditure by day trips from home of £375,500
- Expenditure by cycling main purpose staying trips of £13,500
- Expenditure by general staying trips of £47,000 (i.e. excluding the main purpose trips)

5.16 The overall expenditure within the area resulting from off-road cycling trips to Haldon is therefore around £0.4 million.

5.17 Applying the total expenditure resulting from Haldon to the visitor spend required to support a FTE job for Devon[20] a total of 6.6 direct FTE jobs can be expected from the estimated £0.4 million. This will include the employment at the catering facilities at the park, the ranger employment supported at the Forestry Commission by the car park expenditure and other businesses visited by cyclists in the area. The direct impact at Haldon is likely to be around 2.5 of these 6.6 FTEs, i.e. 39% of the total employment impact.

5.18 The impacts at Haldon are likely to grow in the future as the total volume of use and the proportion of staying visitors grow. The 7stanes project in Scotland[21] had just over 170,000 users per year after Phase One, with 25% staying visitors. The day and staying visitor expenditure supported over 70 FTE jobs at a regional level. 6.5 of these jobs were on site and the rest were in the wider economy. Since Phase One, growth has continued to around 350,000 to 400,000 visits per year.

5.19 This illustrates that:

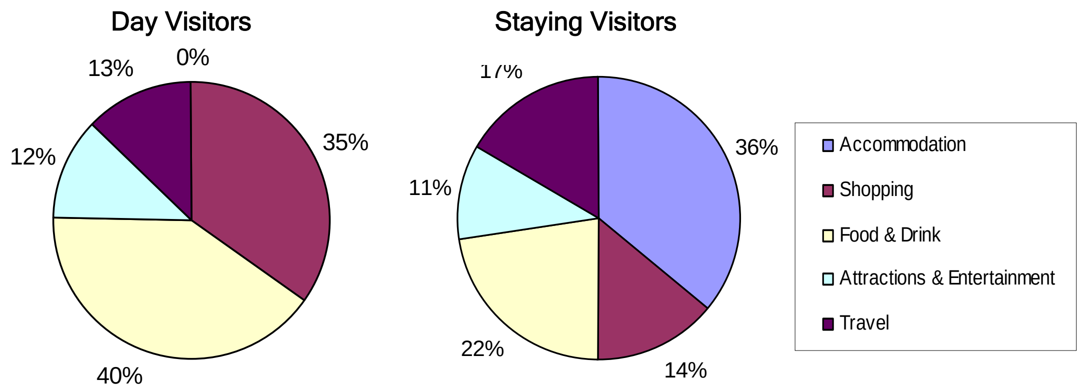
i) Woodland cycling has benefits to the wider economy

ii) The woodland managers receive little of the overall wealth generated

iii) The more staying visitors attracted, the more value to the local economy

[20] South West Tourism (2003) Value of Tourism to the South West.
[21] See Appendix 11

5.20 Spend associated with cycling will be spread across a range of different sectors. The two pie charts below illustrate the spending pattern in Devon for general tourist and day visitors[22].



5.21 Overall the largest sector for expenditure is food and drink (28%) followed closely by accommodation (26%). Day visitors predominantly spend on food and drink and shopping whereas staying visitors will spend money on accommodation (36%). While cycle visitors may have some different expenditure patterns, it is likely that they will broadly replicate the general spending pattern.

Commercial Opportunities

5.22 Woodland cycling commercial opportunities are explored for two reasons:

i) To explore income streams from diversified use of woodlands

ii) To allow off-road cycling to develop by increasing access to private woodlands.

5.23 Large proportions of woodland in the South West are under private ownership. There is a notable lack of off-road cycling using these private woodlands and it is thought that with commercial returns there are opportunities to increase access. This could be in the form of community or club initiatives or larger scale commercial facilities.

5.24 The opportunities are applicable to both private and public woodland landowners. A number of revenue options are set out, drawing upon examples. The discussion also considers some of the issues relating to starting up a private mountain bike facility.

5.25 The commercial opportunities identified range from simple arrangements for third parties paying to develop facilities and trails in woodlands to more complex business models developed by the landowner.

Use Of Woodlands by Mountain Bike Clubs - Member Centres

5.26 This is based on a model for smaller scale lower volume development in partnership with a local club. This may reflect a progression from informal illegal trail construction to a group or club based project that works in partnership with the land owner to develop safe and sustainable trails. This helps to consolidate development in a confined area where it is easier to manage conflict between different forest users and between users and land managers.

5.27 Within this sort of arrangement the landowner can expect to charge a fee on an annual basis. Club members will, by agreement with the landowner, develop trails, and police

[22] £56,648.96 for staying visitors and £67,877.73 for day trips excluding induced and multiplier impacts, Value of Tourism to the South West - ibid.

use of the site. Evidence suggests that revenue will be limited by club membership although as the clubs grow, there may be scope to increase fees. Some examples of member centres include the Woodland Riders in the Tamar Valley and Oke Freeriders in Okehampton. The Woodland Riders have a membership fee of £20 and around 100 members, which means the fee for the land cannot be more than £2,000. Oke Freeriders have a £25 annual membership with approximately 40 members giving an upper limit of £1,000 for lease fees. Fees are therefore likely to vary from site to site depending upon individual arrangements.

5.28 Member centres restrict access to club members only. These restrictions exist for two main reasons: the lease fee is generated through paying club members and secondly, some of the riding can be hazardous. Clubs are in a position to make sure members have their own liability insurance cover.

5.29 Clubs will generally develop member centres gradually and will contribute the necessary time and labour. There are few costs to the landowner and much of the lease fees will be profit. Member centres tend to be low key and have relatively low volumes of use. Rapid expansion is rare for these sites as the member only basis is based upon the local pool of enthusiast riders.

5.30 A number of ad hoc revenue opportunities are available. This includes an uplift service, royalties from event stands, camping pitches and refreshments. The landowner may be able to take a royalty or fixed fee from event stands such as catering, bike promotions/sales, bike demo days etc. Overall the options for revenue are small scale and irregular, depending largely on the activity and scale of the individual club.

Pay to Ride

5.31 This commonly consists of a self-contained centre usually offering high quality mountain bike courses, typically downhill, north shore, freeride or 4X. Such centres use a pay on entry fee which allows visitors full access and unlimited use for a day.

5.32 This model of development is suited to existing multi-activity centres that may have visitor infrastructure in place and therefore only need to focus on the trail construction. Alternatively there could be a progression from a successful member centre to a pay to ride centre, with the member centre acting as a pilot to gauge the demand for different types of trail.

5.33 Aston Hill at Aylesbury and Combe Sydenham near Monksilver on Exmoor provide examples. Aston Hill charge £5 per day but also offers annual membership for unlimited use. Combe Sydenham also charges £5 per day but is currently used more informally with varied opening during the year. Generally a pay to ride fee will include use of a car park.

5.34 Pay to ride sites will need an on-site manager and a greater emphasis on managing, planning and developing the site over time. Therefore the pay to ride sites will require a more active approach from the landowner. A variation of this model would be a franchise arrangement, such as the situation at Aston Hill where Firecrest Mountain Biking leases the site and is responsible for the overall running and development.

5.35 Start up costs and investment needed to develop pay to ride sites will be significantly higher than member centres. There will need to be a way marked mountain bike course or set of downhill and freeride trails in place. In order to justify an entrance fee and add value for the visitors a minimum set of facilities is likely to be required such as car parking, refreshments, toilets and changing area. A larger pay to ride centre may include cycle hire and shop franchise, bike wash, uplift (for a downhill course), and overnight or longer stay camping facilities.

Car Parking

5.36 There are a number of examples where car parking charges are used as a mechanism to raise revenue. This will also work where car parks are used for a variety of recreation uses as well as cycling. In order to justify a parking fee there should be added value facilities for the users (such as toilets etc). The opportunity to charge is dependent on a lack of local free parking. Examples include:

- Car parking revenue at 7Stanes covers the cost of trail maintenance across the eight different sites (thought to be around £150,000 per year). This is from the revenue received at all of the car parks
- Coed y Brenin in North Wales charge £1 per hour or £3 all day, and in 2004 the revenue from this was approximately £60,000
- Nant yr Airan in mid Wales had a fee of £1 per day and generated approximately £20,000 in 2004[23]
- The Cannock Chase parking facilities are thought to bring in £20,000 per year based broadly on 200,000 cycling users
- Haldon Forest Park near Exeter has only been operational since May. It has collected approximately £11,000 in four months through parking meters and annual parking permits. This could equate to approximately £25,000 over one year assuming 50% reduced revenue during 6 months off-peak

Café / Catering Facility

5.37 The viability of providing catering will depend on a reasonably high and sustained level of use. However, with suitable promotion a good catering facility in a quality location will build wider use of the overall site as well as just serving existing users:

- Limited data has shown that Coed y Brenin has combined cycle hire and café revenue of £100,000 in 2004.
- The café and visitor shop at Cannock Chase has an approximate turnover of £30,000 per year.
- A third party mobile catering facility at Haldon pays a 15% royalty to the Forestry Commission. Over three months this provided an income of £872.

Cycle Hire

5.38 A cycle hire facility has revenue potential. However, the volume of use, the length of trails and hence length of riding time on offer will need to be adequate in order to generate customer demand for bike hire. Examples include[24]:

- Bissoe Tramways Cycle Hire near Truro has an annual turnover of £95,000 based upon a core of 250 rental bikes.
- Tarka Trail Cycle Centre is thought to take £45,000 over a 6 month annual operating period from 130 rental bikes.
- Bideford Cycle Hire again based on the Tarka Trail takes £80,000 from 220 rental bikes.
- Fremington Cycle hire also based on the Tarka Trail takes an estimated £50,000 over 6 months.
- Coed y Brenin café and cycle hire takes £100,000 per year.

Cycle Shop

5.39 The provision of a cycle shop selling spare parts, offering repairs and possibly a larger bike sales element is another commercial opportunity. This service is more likely to be an addition to a successful cycle centre where the volumes of users make it viable. Logically this would be part of a cycle hire facility. Successful examples of cycle shops

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[23] Total Marketing Solutions (2005) Tamar Valley Mining Heritage Project – Sawmills Report
[24] Total Marketing Solutions (2005) Tamar Valley Mining Heritage Project – Sawmills Report

are the Pedalabikeaway at the Forest of Dean and Swinnerton Cycles at Cannock Chase. Both of these are franchise businesses paying a rental fee to the land owners and are based at specialist centres which can cater for a variety of users (e.g. enthusiast and family).

Bike Wash

5.40 Bike wash facilities are being installed at the popular Welsh mountain bike centres. For example, Coed y Brenin charges £1 per wash and is thought to collect £5,000 per year[25]. Handling contaminated waste water (oil from the bikes or the cleaning products used) can be problematic.

Changing and shower facilities

5.41 Demand at the Welsh centres has led to shower rooms/cubicles being installed at a charge of £0.20 per minute. This can be one of several services that add value and help to provide a complete package.

Camping / Accommodation

5.42 The specialist centres in Wales and Scotland can attract main purpose visitors from further away. Camping facilities are relatively simple to set up and viability will depend on the trails generating good demand. The provision of a camping area will fit well with cycling events. Good examples can be drawn from the weekend racing and general mountain bike festivals organised by MBR every year. Camping facilities can use existing toilet and shower facilities. They also offer the opportunity to trial catering provision, even if only on a temporary arrangement for events.

Uplift

5.43 Permanent uplift facilities are fairly rare in the UK, however many temporary and improvised operations exist. Use of heavy duty 4x4 vehicles with some kind of trailer is popular where there is adequate access from the bottom of the hill to the top. For example the land used for part of the MTB Freeride member centre at Okeford Hill is owned by a farmer who has assisted with the use of his tractor and trailer for an uplift service. Uplift machinery can be an expensive purchase; the Combe Sydenham feasibility study estimated £35,000-£40,000 for the purchase of a vehicle and trailer.

5.44 Charging for use of the uplift could be based on a day pass or per lift fee. The uplift at the Glyncorrwg Mountain Bike Centre in South Wales charge £5 per person for one uplift. Providing an uplift service will result in maintenance costs for the vehicle and the uplift track maintenance, as well as driver costs.

Ride Guide Holiday Operators

5.45 There are some opportunities for both land owners and other individuals to provide commercial cycle guide services for those people wanting an off-road cycling holiday. For example Exmoor and Quantocks Mountain Biking have an accommodation and ride guide business for tailor made cycling holidays. The service includes self-catering accommodation, transport (drop-off and pick-up for rides) and tailor made route plans depending on ability and stamina and facilities. There is also access to a wash down area, a fully equipped mountain bike workshop and an outdoor heated pool.

5.46 Peak season is May-June although September and October are also busy. A weekend in June costs £80 per person. Marketing for 2006 has focused on ladies only weekends which have been popular and have helped contribute to a 50:50 ratio of male to female guests overall. The off-season profile tends to be groups of thirty something male enthusiasts.

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[25] Total Marketing Solutions (2005) Tamar Valley Mining Heritage Project – Sawmills Report

5.47 This sort of setup would work best for the informal geographic hubs where guide and accommodation operators can overcome disadvantages such as unmarked routes, unfamiliar territory, and lack of bike wash and maintenance facilities.

5.48 Mountain bike skills training also provides commercial opportunities that can be undertaken across different woodland cycling locations. Training capabilities can be developed at one site and then rolled out across different locations[26]. This type of training can also deliver social inclusion objectives although this would need to involve some partnership working between the commercial training organisation and publicly funded organisations to develop and implement these types of programmes.

Larger Multi-Use Centres

5.49 A larger multi-use centre will offer a range of outdoor and recreational activities including mountain bike facilities. It will generally have a large woodland estate that can be used for off-road cycling and infrastructure used by people pursuing a cross section of activities.

5.50 Multi-use centres will often consider adding to the portfolio of activities available. The existing business can provide a base for new investment. The Moors Valley Country Park near Ringwood is an example which features a variety of family orientated activities including adventure play areas, a Go Ape high wire forest trail, cycling trails, steam engine ride and golf course as well as a visitor shop, restaurant, café, bike hire and pay and display car park. Ashton Court, in Bristol is a similar multi-use site centered on a historic house and parkland near to the city centre with a calendar of high profile events. The parkland includes that Timberland Trail and other bike routes, which receives extensive use from local riders living in the city.

5.51 The multi-use centres can benefit from introducing off-road trails which complement the other activities they may already offer and provide new users for the existing visitor facilities. The ability to build on existing facilities can reduce the overall level of investment needed, and available money can be focused on the development of off-road trails etc.

Development Process

5.52 A common approach is one of gradual progression where the infrastructure and trails develop through a club or local group who can then play a part in developing a commercial facility. For example, the Woodland Riders now have a role in the development of a large scale mountain bike facility as part of the Tamar Valley Mining Heritage Project. At Aston Hill, development of a pay to ride facility will involve individuals committed to the sport and this approach will result in a challenging trail to create interest amongst an enthusiast market.

Markets

5.53 The evidence suggests that privately developed mountain bike sites are generally smaller in scale and cater for a niche market of enthusiast bikers who like to ride downhill, freeride, north shore and jumps.

5.54 Multi-use centres are more likely to have formal management arrangements, such as at Ashton Court. The multi-use centres typically have more provision for the family market and therefore trails tend to be developed on a different, more formal basis.

Issues

5.55 One of the most important aspects to consider when inviting the public onto private land is the issue of health and safety for the riders and the implications of liability.

[26] CTC provides instructor and participant training courses - http://www.ctc.org.uk/

5.56 Member centres can tackle part of this problem through affiliation to the IMBA. For £25 per year they can benefit from a comprehensive third party insurance policy based upon a designated list of club members. This covers club members while using trails. IMBA also offers member cycle insurance for around £14 per year which covers an individual for third party liability. It is estimated that 99% of UK riders have no third party liability insurance[27].

5.57 BTCV can arrange specialist insurance cover for trail building and construction.

5.58 Membership of the national cyclists' organisation CTC provides members with free third party insurance. CTC also provides insurance policies for clubs and is developing further off-road specific policies. British Cycling also offers specialist insurance services.

5.59 It is important that landowners have their own cover against third party claims. Many landowners will have a landowner policy and for a nominal fee they can add an extension to this which will cover the more limited owner liability for any incidents that may occur on member centres.

5.60 For pay to ride centres the typical setup is slightly different. As a centre they need to be covered for liability and will need to take out a private insurance policy for this. The Aston Hill mountain bike area has a policy that covers public liability as a mountain bike centre, instructor liability, employer's liability, and small amount of product liability. This is thought to cost approximately £2,000 per year. Riders using the site are covered by the policy.

5.61 The use of the standard trail grades developed by IMBA can reduce liability. In essence, different grade trails are categorised on a standard basis so riders are aware of the standard required before they start.

5.62 One of the benefits in favour of developing off-road cycling facilities is that the authorised and responsible use and regular on-site presence can alleviate some of the land management problems that landowners face. Examples include fly tipping, illegal motorbike or mountain bike use, car dumping and use as a traveler's site etc, all of which can bear a financial cost to the landowner.

5.63 Off-road cycling in general is a seasonal activity for the general market, with the majority of use from May-September. This will be more evident on the family based trails and also for the cycle specific holiday businesses. Enthusiasts will be less seasonal. Evening use is popular in the summer but constrained by lack of daylight during the winter. As a result this restricts visiting times for most riders to weekends only. Seasonality must not be overlooked when weighing up the pros and cons of any mountain bike development.

5.64 Over the long term the seasonality of tourism is reducing and woodland off-road cycling will both encourage this process and benefit from it.

Wider Commercial Opportunities

5.65 Construction of cycle specific car parks and associated facilities has proven to work well at some of the larger specialist centres which have a through flow of custom, thus justifying the initial set up costs and ongoing development. However, there may be reluctance for small scale private projects to make this sort of commitment. In order to establish a more robust business model by linking cycling with other commercial opportunities such as a farm shop, Christmas trees sales in December, woodland products, children's play areas, wildlife trails etc. Together these may provide a business model suitable to justify the infrastructure. Investment in parking facilities and café or visitor centre will be shared amongst different markets.

[27] Consultation with IMBA – September 2006

5.66 As well as opportunities to raise revenue directly from users, there are also indirect commercial opportunities for land-based businesses. These will include forest maintenance contractors, sign and way mark manufacturers, trail builders and quarries supplying aggregate for trails.

Summary

5.67 Off-road cycling has a significant economic impact. It is estimated that spend by day and staying cyclists is between £81.2 and £129.2 million annually in the South West and that this supports between 1,323 and 2,013 FTE jobs. This expenditure is across a range of sectors, particularly catering, accommodation and retail.

5.68 While there is a significant impact across the wider economy, it is apparent that in many cases the organisations with the responsibility for maintaining the woodlands receive only a small part of the wealth. However there are commercial opportunities that can provide income for landowners. These opportunities include:

- Use of woodlands by mountain bike clubs as a member centre
- Pay to ride model
- Car parking – can be provided on a pay and display basis
- Café / catering facilities - can be profitable where there is reasonable level of use. Provision can be provided on a permanent or mobile basis
- A cycle hire facility can be implemented where extensive trails can generate suitable customer demand
- Adding a cycle shop to a cycle hire facility where there is enough customer volume
- Bike wash facilities are simple to set up and can be successful at high volume centres
- Changing and shower facilities
- Camping/accommodation could be used during events but may only feature as a permanent fixture at larger specialist centres
- Uplift – for site with downhill courses
- Ride guide holiday operators
- Mountain bike skills training
- Opportunities for land-based enterprises for trail creation and maintenance

5.69 There are three commonly identified development approaches. The member centre is a small scale local initiative creating revenue through a lease arrangement. Developing a pay to ride centre has the capacity generate public demand through niche mountain bike courses. A third development model involves the introduction of off-road trails for a varied market to a larger multi-use centre, making use of existing visitor facilities.

5.70 Health and safety issues including liability need to be considered. Insurance is available from IMBA, BCTV, CTC, British Cycling and from other professional insurers. Cycling clubs can use this insurance for cover while building and using their Member Centre. Riders should have an individual policy for personal liability cover. Pay to ride sites will need a private insurance policy. The use of the standard trail grades developed by IMBA can reduce liability.

6 DEVELOPMENT PRIORITIES

Context for Development

6.1 Cycling in woodlands addresses economic, health, and community policies. It is also an activity with levels of demand outstripping supply. The earlier sections in the report indicate that:

- The high quality landscape is one of the region's key assets, and woodlands are part of this asset. This asset underpins much of the region's economy, especially the tourism industry
- Compared to other parts of the landscape, woodlands provide a relatively robust location for cycling and other recreation, with:
  - High carrying capacity
  - An ability to hide considerable levels of use
  - The use of vegetation to segregate cyclists from other users, even in relatively confined areas
  - Shelter from wind and rain enabling cycling in adverse weather conditions
  - A relatively robust surface for cycling and other uses
  - Mechanisms for repairing damage
- In common with other recreational use of the countryside, woodland off-road cycling has environmental impacts through access by private car
- Woodland off-road cycling can provide significant health and social benefits although these will typically depend on supporting revenue projects
- Woodland off-road cycling produces economic benefits at a regional and local level, although the woodland owner/manager will receive only part of the overall benefit
- There is already considerable demand for off-road cycling in woodlands, with between 4 to 8 million woodland cycling trips a year, of which about 1 million are by staying visitors
- The evidence from other centres around the UK has shown increasing demand, with much of this demand revealed through the development of new facilities
- There is substantial untapped potential demand from visitors to the South West, including demand by two of the brand clusters identified as having good potential for tourism development in the Region.
- Off-road cycling in woodlands contributes towards the objectives of the regional tourism strategy through offering a relatively non-seasonal quality use of the countryside
- While there are at least 200 off-road woodland cycling locations in the region, most activity is within ten 'Hubs'. These are not spread evenly throughout the region and compared to the actual and potential demand from residents and visitors, Cornwall is underserved and there are also opportunities for new provision in the north east and south east of the region

6.2 These factors provide a strong policy and commercial basis for developing off-road cycling in woodlands in the South West. However developing this activity needs to be assessed against a set of economic, environmental and social criteria in order to maximise the benefits and reduce negative impacts.

Development Vision

6.3 These policy and commercial drivers suggest a vision for the future of off-road cycling in woodlands:

The region's woodlands will capitalise upon their natural advantages to form a well-used resource for cycling by a wide cross-section of the resident and visiting population. This will be managed to ensure that the woodland resource is conserved and enhanced and that impacts on the wider environment are minimised. Woodlands will become a significant part of the region's tourism profile amongst the appropriate markets and will support a sustainable quality-driven tourism industry. The use of woodlands for off-road cycling will build health and community benefits amongst targeted groups as well as the general population. The use of woodlands as a cycling resource will provide a viable business model that will support other forestry activities and provide a basis for necessary investments.

6.4 Part of this vision is already in place, through the woodland cycling facilities already identified in this report and by the volume of residents and visitors currently cycling in woodlands. However the vision also reflects the future for woodland cycling, both in terms of more demand and more woodland cycling supply. In order to create the successful future captured by the vision, it is useful to spell out the specific elements that should be part of future woodland cycling. This is set out below through a set of sustainable development objectives and these are then used to form an appraisal framework.

Sustainable Development

6.5 The four objectives for pursuing sustainable development were set out by the UK government in May 1999:

i) Social progress that recognises the needs of everyone

ii) Effective protection of the environment

iii) Prudent use of resources

iv) The maintenance of high and stable levels of economic development

6.6 The regional sustainable development framework[28] sets out the key South West sustainability issues:

- Protecting our natural environment whilst meeting the development needs of a thriving economy, and achieving an inclusive society
- Dealing with the changing demographics of the region, such as the ageing population and the regional disparities
- Addressing rural inequalities such as access to services
- Alleviating the impact of seasonal tourism on parts of the region, including traffic congestion in the summer and unemployment in the winter
- Improving transportation options within the region
- Responding to the opportunities of e-commerce, e-learning and e-government
- Managing the countryside against a background of change to the rural economy
- Responding to the needs of urban communities

[28] A Sustainable Future for the South West, Sustainability South West, 2001

6.7 South West Tourism has used these principles to develop a set of sustainable tourism development criteria based on visitor satisfaction, industry value, community impact and environmental impact (VICE):

- **Visitor satisfaction** includes indicators such as seasonal availability, accessibility, quality and visitor focused sustainability initiatives (local produce promotion etc.)
- **Industry value** also includes reducing seasonality and economic leakage and as well as considering growth potential
- **Community impact** also includes seasonality as well as cultural contribution, quality and value of employment, career development potential, regeneration, local produce, public transport and partnership
- **Environmental impact** includes pollution and climate change, physical impact, use of resources, renewable energy, environmental awareness promotion, traffic miles, payback and development contributions and environmental goods and services

6.8 A set of woodland cycling development objectives are set out below based on the Regional Sustainability Framework and the VICE model.

Woodland Cycling Development Objectives

6.9 The objectives for the development of off-road cycling in woodlands are:

- To provide economic benefits for the region, particularly through attracting additional visitor income
- At a local level, provide economic benefits for woodland owners and other businesses, particularly in rural locations where there may be relatively few other economic opportunities
- To capitalise on the high quality natural environment
- To protect the high quality natural environment
- To provide opportunities for deprived communities to participate in activity in the countryside
- To use woodland cycling as part of a suite of activities to promote health
- To capitalise upon the growth potential for the sport

Appraisal Framework

6.10 Based upon these objectives it is possible to generate criteria on which to assess the future development of off road cycling. Options for developing new facilities or initiatives can be assessed against:

Economic

- Economic benefits to the region, through a strategic regional approach
- Local economic benefits to the landowners and other businesses (such as retail, catering, accommodation etc.
- The region’s profile, particularly to those people in the South West Tourism ‘It’s adventure’ and ‘Close to nature’ brand clusters but also potential investors and migrants
- Seasonality impacts
- Quality of visitor experience
- Allowing incremental growth in demand

- Prompting additional demand for off road cycling
- Producing viable models

Environment

- Their impact on the locations used for cycling
- The sustainability of transport to cycling locations
- Increased access to the countryside
- Whether the worth of the region's environmental resource is celebrated
- Minimising the impacts of off road cycling on the environment through education

Social/Health

- Increasing social inclusion for deprived areas
- Increasing health benefits
- Increasing sports/activity provision

6.11 These criteria can be used to assess the options for developing off-road cycling facilities in the region.

Summary

6.12 The objectives for the development of off-road cycling in woodlands in the South West are environmental, economic and social:

- Capitalise on the high quality natural environment
- Conserve the high quality natural environment
- Build economic benefits for the region, particularly through attracting additional visitor income and also provide local benefits in rural areas including woodland businesses
- Provide opportunities for deprived communities to participate in activity in the countryside

6.13 These objectives are in the context of an identified growth potential for off-road cycling in woodlands.

7 DEVELOPMENT OPTIONS

Introduction

7.1 This section considers the different ways that off-road cycling can be developed in South West woodlands. This uses a set of development typologies, reflecting the different scale of potential approaches.

7.2 The section commences with a discussion of the characteristics of each development type and then undertakes an appraisal based upon the criteria developed in the preceding section.

7.3 Some locations for development are discussed although these are generally in advance of any detailed discussion with the landowners concerned.

7.4 Woodlands have been identified earlier in this report as a particularly suitable location for off-road cycling because of carrying capacity, the relatively robust natural environment and the ability to alleviate visual impacts. The development options discussed here are therefore focused upon woodland situations.

Specialist Centres

Key Characteristics

7.5 Specialist centres have a variety of features but at their core they tend to offer:

- A variety of high quality trails which are mapped and way marked
- Payable car parking facilities
- Toilets
- Refreshment opportunities, ranging from franchised vans to permanent cafes
- On site staff

7.6 In addition there is a range of other facilities which are typically provided at specialist centres across the region. These include playgrounds, visitor centres, arts/sculpture trails/centres, shops, bike hire and bike-wash. Existing Specialist Centres form three out of the five Focal Point Hubs discussed earlier.

7.7 The user survey found that the Forest of Dean and Moors Valley were popular with staying visitors while Haldon and Ashton Court were not. It is likely that this relates in part to the cycle hire facilities at the first two locations. The marketing of centres to visitors when choosing their holiday locations and while on holiday within the region will also influence staying visitor use.

7.8 The landscape/topography required for a specialist centre is an important feature. Whilst woodlands can provide robust environments for cycling with a good carrying capacity, high use has brought some capacity/erosion issues. Specialist centres will typically have mechanisms to repair damage and manage use.

Pros/Cons

7.9 Specialist centres clearly capture high numbers of cyclists and, in offering chargeable facilities, have the ability to concentrate economic impacts compared to other woodland cycling options.

7.10 Successful specialist centres offer a range of cycling for different abilities and therefore draw upon a larger potential audience, again increasing the scope for higher economic impacts. The family market is important for these specialist centres and this can provide the volumes of use to make the centre viable as well as by catering for smaller enthusiast markets.

7.11 The existing centres are accessed relatively easily by large population centres and clearly the ability to be used by a large potential audience is an important factor to the success of a centre. Survey work undertaken at the specialist sites found that users were attracted from significant distances; a fact less evident in the smaller centres.

7.12 Specialist centres are easier to promote. The publicity attracted when Haldon opened was significant and visitor numbers exceeded expectations. Specialist and general press are likely to cover specialist centres.

7.13 The specialist centres offer 'certainties' for less experienced off-road cyclists e.g. waymarked routes which are mapped, safe parking, toilet facilities etc. This is particularly important for the general family market.

7.14 There is however a number of issues which are more problematic in terms of the establishment of a specialist centre. If it is assumed that land ownership is not an issue, the obvious concern is the cost of a centre, both in terms of capital costs and revenue costs. While there are different methods to fund specialist centres, providing the required trails and facilities is an expensive option. A cheaper variant is to expand and develop existing low key facilities into specialist centres.

7.15 While this study has revealed significant demand for mountain biking within the region and there are strong examples of how new woodland cycling centres have revealed latent demand, there is still some risk in establishing a specialist centre.

Observations in relation to identified hubs

7.16 The current provision of specialist centres and other woodland cycling hubs shows a gap in provision for Cornwall, West Devon and Plymouth. While the plans for the Tamar Valley may fill some of this gap (particularly for Plymouth), there remains an opportunity for another public facility somewhere in Cornwall.

7.17 In addition, there may also be scope for more formalised mountain biking trail provision within the Purbeck – Bournemouth/Poole vicinity or in the Cotswolds.

Environmental and Social Impacts

7.18 The construction of a specialist centre may have a significant impact upon the environment although impacts would depend on the siting and scale of any new buildings and trails. Clearly sensitive and visually prominent locations should be avoided and the impact upon other surrounding facilities e.g. road networks, car parks etc. should be assessed as a part of any feasibility study.

7.19 Specialist centres potentially create an opportunity to appeal to a wider socio-economic market than the other development models. This is because they are generally sited closer to a larger population centre and therefore may be more likely to provide public transport initiatives (enabling those without access to a private vehicle to actually access the sites), provide a basis for social/health activities e.g. exercise referral schemes and be used by local clubs e.g. scouts or school groups.

7.20 Access to specialist centres is important. Where possible car-free access should be provided, and this may take the form of links with the National Cycle Network, other traffic-free or low traffic routes or public transport options that include cycle carriage. Ultimately, proximity to the main centres of demand will minimise the environmental impact of travel.

Marketing Development

7.21 Stimulating significant levels of demand and usage of these specialist centres through active marketing and PR should be considerably easier than for other models of development given both their relative scale and likely proximity to large population centres or large numbers of staying tourists.

7.22 At Haldon there is already a successful example of developing and promoting a specialist centre within the region. Where Haldon has very successfully attracted significant numbers of visitors from the local population, it has not as yet attracted large numbers of tourists even though there are relatively large numbers of visiting tourists within a short travel distance to the site.

7.23 The marketing challenge for any future centre development would be to attract both the local and tourist populations. The inclusion of a cycle hire facility will facilitate general tourist use of centres.

Costs

7.24 Haldon Forest Park's cycling trails and associated facilities were developed for £1.2 million. This provided for a car park, toilets, arts centre (which refurbished an old Forestry Commission building), trails and a playground.

7.25 The 7 Stanes project involved the development of 7 mountain biking centres in Scotland. Whilst the basic infrastructure was in place at many of these sites (car parking, visitor centre, access roads) the development of the network of cycle trails cost £2million.

7.26 Discussions as part of this study suggest that a suitable budget for the provision of a new centre with refreshment facilities and cycle hire would be in the order of £2 million.

Geographic Hubs

Key Characteristics

7.27 Geographic hubs are areas of woodland and other countryside offering public space to cycle off-road. They tend to be high environmental quality locations, often with landscape designations (e.g. AONB). The geographic hubs are also remote from large centres of population.

7.28 Unlike specialist centres, these informal locations offer few 'certainties' (such as way marked routes) and as a result will attract enthusiasts rather than the general market. Few of these geographic hubs have undertaken specific marketing although word of mouth, specialist guidebooks and cycling magazines have raised awareness.

7.29 Facilities at these centres vary but few feature any facilities which have been provided specifically for use by mountain bikers. Car parks are generally free (AONB/National Park run) and facilities (toilets, cafes etc) provided either for the general tourist market or as part of the local village services. Most of the cycling is on bridleways and typically there is little signposting to any supporting facilities such as shops or pubs/cafes.

7.30 There is considerable scope to provide more features at geographic hubs which may increase usage by cyclists. Way marking, route maps with grading, signposting of facilities and clear car parking provision are a few of the options in addition to wider and joint publicity with other cycling sites.

Pros/Cons

7.31 There are a number of positive aspects of creating a network of these geographic hubs. We have clearly identified a number of individual locations which fit this theme – they include the Quantocks, Mendips, Exmoor, Dartmoor, Purbeck and Woodbury Common. These sites provide a wide variety of high quality biking routes yet share many similarities in terms of a lack of cycle focused development. Efforts to develop the potential of the sites are likely to increase usage and increase the profile of these sites at a national level.

7.32 Providing accessible, waymarked routes supported by marketing as part of a network of useable geographic hubs will increase demand and potential benefits.

7.33 In geographic hubs there are some problems with erosion and usage levels. By investing in promotion of routes and areas suitable for off-road cycling there is the opportunity to manage use and reduce damage on some of the more sensitive locations. An option here is for events and other products and services to be used to generate funds for trail maintenance. The Exmoor Explorer annually devotes funds from entry fees to the maintenance of paths and trails in the NPA.

7.34 An issue with geographic hubs is the lack of focused economic benefits, particularly for the land owners or managers. Whilst a network of informal sites is likely to increase usage and awareness of these sites, there are few chargeable facilities. Nonetheless there will be employment supported through cyclists' use of local shops, pubs and accommodation. This can be maximised if routes, signing and other information are used to raise awareness and provide passing trade.

7.35 The informal sites tend to be used more by enthusiasts and less by the family market. The larger family market is an important sector with more scope for generating economic benefits and development of geographic hubs for this market could provide important local benefits.

7.36 The sites also tend to be important tourist destinations because of their high landscape quality although the distance from urban centres restricts the potential residents market as well as increasing the environmental impact of travel.

7.37 There is some concern that the development of the free to access geographic hubs might jeopardise private sector opportunities. However, this study does show that people are prepared to pay for special facilities in both the enthusiasts and general market through trail fees or parking charges. Therefore it is likely that there will be room for both chargeable and free access facilities.

7.38 The issue of sensitive landscapes is important. Any moves to increase usage of these locations for cycling needs to take account of the landscape, its setting and impact upon local communities. Whilst it is likely that biking in these locations will continue (and possibly increase) anyway, a careful and sensitive approach to development and marketing of these locations is clearly required.

7.39 Landowners will need to be involved at the earliest stage of discussion about development of cycling in Geographic Hubs.

Observations in Relation to Geographic Hubs

7.40 While information from cycling clubs and other consultees suggested that geographic hubs are popular woodland cycling locations it is clear from the survey work that in absolute terms the use is limited, mainly enthusiasts and dispersed across the landscape.

7.41 Whilst this is part of the attraction of these areas it also means that the economic impact of these sites is likely to be lower. It is also more difficult to manage use of these areas given the very informal nature of trail provision.

7.42 Whilst many of these areas are promoted through word of mouth, there has been some formal marketing information for individual areas. Examples include the Quantocks and Mendips AONB services that have both developed cycling route maps. Whilst future projects in some locations will seek to tackle the fragmented nature of initiatives e.g. the Cyclex project in Exmoor, no cycling links between these informal hubs have yet been made. The possibility of providing waymarked trails and graded route maps with identified car parks and refreshment opportunities individually and as part of a network is an option.

Environmental, Social and Economic Impacts

7.43 The typical location of geographic hubs in relatively remote landscapes raises issues about whether they can carry further recreational use. Whilst this model does not advocate the development of additional facilities and trails in fragile landscapes, the impact of increased numbers of cyclists on the environment is an important issue.

7.44 Greater marketing and increased signposting of routes will need to take into account environmental impacts of greater levels of users and the impact upon rural road networks and villages. However, information through leaflets and way marking can displace use to more suitable locations away from fragile sites or congested routes.

7.45 The use of signing and information to encourage use of local facilities will enable the economic benefits to be maximised. This would encourage people to start cycling at village or pub car parks through signage etc, rather than isolated rural locations with no opportunities to spend money locally.

7.46 The remote locations often mean poor car-free access. These impacts can be mitigated through measures such as providing bike hire facilities in nearby towns and villages linked to promoted off-road routes using bridleways and woodlands. While this may not appeal to the enthusiasts market (who will generally require their own specialist cycles), it will allow the growth in use by a more general local and holiday market.

Marketing Development

7.47 Developing a coordinated approach to the way that these geographic hubs are marketed and promoted would allow for consistency and greater impact. A clear opportunity exists to develop an 'over-arching' brand that could be used by all participating geographic hubs. Some joint marketing may also be possible in order to highlight the similarities of the mountain biking experience within these locations and to promote the high quality of the routes available within the region (similar to the 7 Stanes theme). Sensitive assessment of the individual locations/routes will clearly be necessary before such initiatives can be developed.

7.48 Through selective marketing of these geographic hubs it should be possible to reduce the impact of cycling on the more sensitive sites by moving use to other locations.

Costs

7.49 At Cannock Chase £10,000 funding was received from the Countryside Agency to provide marketing, educational and conflicts and sensitive habitats awareness materials. Similar promotional/educational materials would work well for geographic hubs.

7.50 Phase 2 of the 7 Stanes scheme is a larger project which seeks to broaden the visitor market. Initiatives to achieve this include promotion of the 7 Stanes brand and improved facilities and signage across all sites. This element of the scheme is likely to cost in the region of £1.2 million.

Locally Established Member Centres

Key Characteristics

7.51 Member Centres are facilities developed and operated by clubs for their own use with the agreement of the host landowner. This model has been used to address local demand, and in some areas unauthorised use, for off road sites. Demand has generally come from local enthusiast riders who are willing to invest their time to develop bike trails. Sites have been both private and publicly owned. Typically the clubs concerned are in IMBA membership.

7.52 A fee is paid to the landowners in return for use, allowing the club to develop trails and jumps upon the site. Clubs raise fees from annual membership and on occasion from sponsorship or through grant funding such as Awards for All.

Pros/Cons

7.53 This has been a successful approach in a number of locations, providing access to high quality off road cycling locations and addressing the problem of unauthorised use in some locations.

7.54 Membership of IMBA and use of their insurance scheme has reduced landowner's liability and the use of IMBA trail grading addresses some health and safety issues. This element is important in overcoming a significant issue for landowners.

7.55 Local groups have been successful in developing these centres on a voluntary basis with little input from landowners.

7.56 In the known South West Member Centres, membership of the clubs has grown considerably over recent years, indicating that such initiatives have been important in establishing local foci for off road cycling and have revealed latent demand.

7.57 Across the region there are number of clubs which are keen to develop sites under this model e.g. Idless Woods and tracks near Bissoe in Cornwall.

7.58 It is clear that at a local level these schemes are often successful, however, in comparison to both informal and specialist centres, their economic impact is likely to be relatively low. In addition the need for use to be restricted to members does severely constrain the number of potential users of the centres. In some locations 'open days' and events have been held allowing the general public to use the sites though ultimately membership remains a requirement for regular use. The local nature of these schemes can often mean the environmental costs of accessing them are small.

7.59 Successful examples include:

Woodland Riders

- Woodland Riders club has developed an area of land on the edge of a mining heritage site in the Tamar Valley called Devon Great Consols. Whilst people had ridden there for years, this was generally without the landowners' permission. In 2004 the landowner agreed access rights with the mountain bikers provided a list of conditions were met. The main condition was that the bikers should be part of a club and that only club members would be permitted to ride on the site
- An annual premium is paid to the landowner by the club and hence the club operates a membership fee. The annual membership fee is £20.00 for adults and £10 for under 16's
- In return for this annual premium the club has been allowed to develop a series of tracks. A selection of northshore jumps was also developed in 2005 and in addition more tracks are being added at present. There will soon be a total of 6 full courses catering for a range of riding styles

Okefreeriders

- Okefreeriders (Okehampton and area mountain bike club) is another scheme based on this model. This group was set up as a means of building north shore structures in Abbeyford Woods
- Whilst the landowners (Forestry Commission) had removed illegally built jumps, they were willing for north shore facilities to be constructed, providing that this was built by an official club with IMBA membership and IMBA insurance. The club was formed and began developing trails within the woodland and recently has been successful in obtaining Awards for All lottery funding to assist with trail building costs
- Membership has now increased from 6 to 40 members, significantly more north shore has been developed and a solid relationship has been built up between the

club and the Forestry Commission. Annual membership costs are £25 for adults over 18 and £15 for members under 17

7.60 Consultations have revealed that there may be opportunities for schemes of this kind, with several clubs in different stages of developing facilities.

Environmental and Social Impacts

7.61 The development of local member centres involves varying levels of physical development in the form of trails. Generally however, there is little construction of supporting facilities (mostly due to the fact that there will never be enough riders to demand new facilities) and most of the development involves the construction of new trails.

7.62 The environmental impacts are minimised by the need for landowner agreement prior to construction. Whilst this appears to have been the case for most schemes there have been instances where concerns have been raised following trail building despite landowner agreement for the building operations. In these cases, education and consultation have alleviated concerns raised.

7.63 Given that these schemes operate on a club led basis, the opportunities for increased social inclusion are restricted. Fees are charged for club membership and whilst relatively low, research has not revealed any instances where sites are used by excluded groups. In addition the clubs tend to operate in areas which are not in close proximity to the major centres of population which accommodate the larger numbers of excluded groups.

Marketing Development

7.64 By their very nature, marketing of these locally established member centres is likely to remain low key and driven very much by the members.

7.65 As any centre develops its popularity, activities and membership numbers it should be possible to develop joint initiatives as a part of wider marketing activity to support off-road cycling in the region but this is entirely dependent upon the future success of these centres.

Costs

7.66 Construction costs for trail development at these centres have been funded through a variety of ways. Examples indicate that funding has been obtained through sponsorship, gifts or through grant funding regimes such as Awards for All. This funding has been sourced by the local club rather than the landowner.

7.67 Membership costs of the clubs also varies but averages at about £20 for adults and 50% of this for children. Club membership is limited (less than 200 in all cases) and therefore the revenue from membership dues for payment to landowners is restricted.

Sites adjacent to large population centres/with mix of uses

Key Characteristics

7.68 The woodland cycling facilities close to population centres are typically provided as part of an area’s public open space. This will include a variety of informal recreation users with cycling being one of the activities available. Examples include Ashton Court in Bristol. Country park locations near many of the region’s larger settlements also fulfill this role although few have any significant dedicated woodland cycling trails.

7.69 These centres have two key elements:

i) Close proximity to a large urban settlement

ii) Appeal for a variety of users as well as cyclists

7.70 Close proximity to centres of population (or popular tourism destinations) may increase demand over and above that expected purely by its cycling facilities.

Pros/Cons

7.71 These locations will create interest from a broad market. Many of the supporting facilities such as car parking, toilets and refreshment opportunities will be serving the wider pool of users as well as cyclists and this will reduce the costs of providing for cyclists. In addition, the large pool of users will also provide good support for cafés etc., and build the viability of providing these facilities.

7.72 It may however be difficult to meet the needs of different users in one location. There may be conflicts of interests between users e.g. walkers and cyclists, and even meeting the needs of the wider cycling market can be difficult, with families and enthusiasts needing different trails. However, the carrying capacity of woodlands provides more ability to accommodate different users within a limited area than other landscape types.

7.73 It may also be difficult to set up a mixed use centre from scratch. Incorporating a variety of elements may mean there is no clear market and successful marketing may not be easy. Development may work best based on existing facilities e.g. a historic house attraction that includes woodland, or building on the facilities at existing country parks.

Observations in relation to identified hubs

7.74 Ashton Court is clearly a very popular area for mountain bikers. Whilst there has been investment in the Timberland Trail and facilities are available (café, toilets) these are however not purpose built for the use of cyclists. There is also a lack of car parking which, whilst adding to the sustainability of the scheme and its location, does mean it cannot be described as a specialist centre in the same way as Haldon or the Forest of Dean. In some ways it has some overlaps with the Moors Valley Park with the appeal a number of different user groups. Moors Valley offers a sculpture trail, model railway and Go-ape adventure as well as appealing to walkers; and Ashton Court appeals to walkers and those keen to visit historic sites/buildings.

7.75 The Tamar Valley Mining Heritage Project development may also be described as this type of development with its relative proximity to Plymouth and its planned mix of uses ranging from industrial heritage tourism through to walking and mountain biking.

Environmental/Social Impacts

7.76 As these centres often provide facilities for use by a range of audiences, it may be that some supporting facilities are already provided and the development of trails may be the only addition to a potential site. Clearly the environmental impact of trail development will need to be assessed but there will also be a need to review potential user conflicts in terms of the environment – e.g. needing to split walkers/cyclist paths and providing appropriate signage.

7.77 These centres potentially appeal to a wide socio-economic market. As a result of being used by a large range of audiences, opportunities to engage non-cyclists are created. Proximity to population centres generally means better public transport, allowing those without a private vehicle to access the sites. The larger local population also provides a basis for social, health and cultural activities such as exercise referral schemes and use by local clubs e.g. scouts or school groups.

Marketing Development

7.78 Marketing for off-road cycling would form part of wider marketing activity for the centre although stand alone marketing activity would be possible for events and to promote the cycling appeal of the centre.

Costs

7.79 Given that the scale of development at these centres will vary depending on what is provided, it is useful to look at the range of costs already discussed. Provision of specialist centre (to include facilities and trails) is in the order of £1.5 million and provision of signage, marketing etc can range from £10,000 upwards. As an example, the Tamar Valley Mining Heritage Project Business Case shows a provisional operational budget for marketing and PR of £22,000 per annum plus a further £23,000 for a full time Marketing and Promotion Officer.

7.80 It may be possible that marketing and facility development costs could be shared by other elements of the centre, such as existing marketing including reference to the provision of new cycling trails.

Summary

7.81 The following tables provide a summary of the characteristics of the development models and of the assessment of each of the models against the appraisal options criteria.

Summary of Site Development Model Considerations

Site Development Model	*Key Ingredients*	*Key Considerations*	*Economic, Environmental & Social Impacts*
Specialist Centre	• Variety of trails – importantly should include those suitable for the family market • Range of facilities offered – examples include car parking, toilets, refreshment opportunities, bike wash, bike hire (where tourism market is an important demand factor)	• High rates of usage • Often sited in relatively close proximity to urban settlements • Can attract users from further afield than other models • Fairly robust site required in order to minimize landscape /topographical concerns • Potentially easier to promote • Offer clearer 'certainties' for users e.g. facilities, way marked trails etc. • More expensive to set up • Given limited case studies within the South West the development of such a centre will always have some risk attached • There are a number of sites suitable/available within the South West	• Establishment of centre will have physical development impacts upon the environment • Wider impacts upon the environment as a result of increased use of surrounding landscape (trails) and access networks to the site (road, rail, public transport). Centres attract people from further away although there is some evidence of more car sharing than local facilities • Whilst research has revealed relatively few case studies, the centre approach does offer opportunities to attract those from socially excluded groups – public transport initiatives, health referrals etc. • Potential to draw down greatest economic impacts due to higher number of facilities and higher numbers of users.

Site Development Model	*Key Ingredients*	*Key Considerations*	*Economic, Environmental & Social Impacts*
Geographic Hubs	• Facilities vary but few feature purpose built facilities for cyclists • Fairly good bridleway network in locality • Limited cycling for the family/novice market but cater more widely for the more enthusiast cyclist	• Most located in high quality landscape locations • More remote locations • Limited publicity to date but word of mouth through the enthusiast market • Some sites are environmentally sensitive • Offer scope to provide more 'certainties' in relation to these sites e.g. way marking, route maps, facility signposting which would appeal to the general market • Areas often already much visited by tourists – generally due to their high landscape quality	• Lack of purpose built facilities ensures there are fewer impacts upon the landscape as a result of physical development activities • Sensitive landscapes mean that usage levels can impact heavily upon the environment. Proposed increases in usage need to be planned carefully • Way marking may assist in ensuring riders remain away from less sensitive landscapes • Opportunities exist for facilitating an increase in use of the centres by socially excluded groups however; the location of the geographic hubs (remote) and their lack of associated facilities mean that these are less likely to be taken up than for specialist centres • Low economic benefits • Remote locations often lead to environmental costs from use of private transport to access them

Site Development Model	*Key Ingredients*	*Key Considerations*	*Economic, Environmental & Social Impacts*
Member Centres	• Demand is from local riders who are willing to invest their time to develop bike trails • Membership of an IMBA registered club is essential in order to meet heath & safety considerations • Annual fee paid to landowner in return for use of the land • Clubs raise fees from membership subscriptions	• Option has been used to address demand and in some areas unauthorised use for off road sites • Sites can be publicly or privately owned • Local groups have been successful in drawing down funding • Existing demand for sites by local groups within the South West	• Establishment of trails will have physical development impacts upon the environment • Establishment of official trails can mean a reduction in the level of unauthorised cycling and associated environmental problems • Membership approach means that the use of centres is limited to members. Opportunities for social impacts are therefore low • Economic impact relatively low • Local location reduces travel environmental impacts

Site Development Model	*Key Ingredients*	*Key Considerations*	*Economic, Environmental & Social Impacts*
Sites Adjacent to Large Population Centres or with a Mix of Uses	• Close proximity to large centres of population or large tourism populations • Sites which offer other specialisms e.g. historic properties offer range of facilities which, whilst not purpose built for cyclists, are useful – e.g. car parking, café, toilets, visitor centres	• Interest from wide audience – not restricting option to off road cyclists • Larger audience to use facilities which should generate greater economic impact provided • Difficult to meet the needs of different audiences in a single location – potential conflicts of interest • Difficult to set up – if no clear market, publicity may be difficult • Would probably work best on the back of a location with existing strength and facilities • Few potential off road sites which are located close to large centres of population and/or appeal to other users	• Establishment of centre will have physical development impacts upon the environment • Wider impacts upon the environment as a result of increased use of surrounding landscape (trails) and access networks to the site (road, rail, public transport) • Whilst research has revealed relatively few case studies, the centre approach does offer opportunities to attract those from socially excluded groups – public transport initiatives, health referrals etc. • Potential for good public transport access or access via cycle network can reduce travel environmental impact

Assessment of Site Development Models Against Option Appraisal Criteria

Option Appraisal Criteria	*Specialist Centre*	*Geographic Hubs*	*Member Centre*	*Sites Adjacent to Large Population Centre or with a Mix of Uses*
Environment				
Impact on cycling locations	Centre development would have a fairly high impact though the level of this impact would depend on scale and siting of development. Development can assist with directing cyclists to less sensitive locations.	Impact of centres mainly depends upon sensitivity of landscape and levels of use. Given lack of facility development associated with this model however, impacts are likely to be lower than for specialist centres.	Impact of centres depends upon sensitivity of landscape, levels of use and type of trails/facilities developed by the club. Development can assist with directing cyclists to less sensitive locations.	Centre development may have high impact though levels would depend on scale and location of development. If an existing focus for activities already, impact of cycling based activities is likely to be lower than for centres established from scratch. Development can assist with directing cyclists to less sensitive locations.
Transport environmental impact	Some opportunity to provide car free access but likely to attract users from a wide catchment	Poor public transport and remote locations increase private car use	Poor public transport but proximity to users	Relatively good public transport and proximity to users
Increased access to the countryside	Yes	Yes	Yes but in a limited way	Yes in terms of additional users to the same countryside
Celebrate region's environmental resource	Yes	Yes	No	Limited
Raise environmental awareness	Yes	Yes	No	Yes

Option Appraisal Criteria	*Specialist Centre*	*Informal Centre*	*Member Centre*	*Sites Adjacent to Large Population Centre or with a Mix of Uses*
Economic				
Regional economic benefits	Yes	No	No	No
Local commercial benefits	Yes	Benefits to local shops, cafes etc.	Benefits to landowner	Yes
Increase regional profile to target tourist market, investors and migrants	Yes	No	No	Possibly
Reduce seasonality of tourism	Yes	Yes	Not available to visitors	No
Quality visitor experience	Yes	Yes	Not available to visitors	Yes
Allow incremental growth in off-road cycling demand	Yes	Yes	Yes	Yes
Prompt new growth in off-road cycling demand	Yes	Possibly	Yes on a very local basis	Yes
Produce viable business model	Yes	No - likely to need continued public intervention to maintain the resource	Yes	Probably, depending on the other elements of the centre
Social/Health				
Increase social inclusion	Yes, with appropriate revenue projects	No	No	Yes, with appropriate revenue projects
Increase health benefits	Yes, with appropriate revenue projects	No	No	Yes, with appropriate revenue projects
Increase sports and activity participation	Yes, with appropriate revenue projects	No	Yes on a very local basis	Yes, with appropriate revenue projects

8 FUNDING

Introduction

8.1 This section identifies a range of funding streams which have previously provided grants to schemes under the sports, health, environmental and social inclusion agendas. Funding is an important consideration for the deliverability of potential projects.

Sport & Health

8.2 Sport England invests in projects through two funding streams – community and national. At a national level investment is distributed to key sports in conjunction with the national governing bodies and a range of national partners. There are 10 English priority sports, 10 UK/GB priority sports and 10 English development/world class sports. Cycling is a UK wide priority sport.

8.3 Decisions about Sport England funding for grants over £5,000 are made locally by regional sports boards in accordance with regional priorities as identified in the South West Regional Plan for Sport 2004-08. Four strategic themes are identified within this Plan:

- Delivering community sport – providing quality accessible opportunities for all people to get involved in activity and reach their full potential
- Delivering active living – encouraging active healthy lifestyle habits which are fun, enjoyable, fulfilling and beneficial. This includes increasing the use of natural resources in the South West
- Influencing strategic planning – sport and active recreation influencing and linking with other strategic issues in the South West and creating integrated solutions
- Raising sport's profile – creating change to people's actions and perceptions through persuasion and the media. This includes strengthening regional identity through linking high-profile events and using the assets of the region through improved tourism for sports

8.4 Approximately £14 million was allocated to the Community Investment Fund to be distributed between 2005 and 09. It is used to fund both capital and revenue projects which are considered critical in helping to deliver the priorities of the Regional Plan for Sport. It is envisaged that projects which are supported will act as 'beacon' projects and form examples of good practice in the future.

8.5 Those projects which will receive the highest priority are those which contribute most to the themes above. In addition the following aims should be met:

- Increase participation for priority groups – the elderly, disabled, girls and women, multi ethnic groups, young people and those on a low income.
- Provide opportunities in areas of social deprivation and that particularly benefit rurally isolated communities.
- Establish a joined-up approach to linking sport, education, health and the community.
- Secure other sources of funding with the Lottery providing £1 for every £2 of partnership funding
- Maximum allocation of £250,000 to any single project (exceptions will be considered for large projects bringing in significant levels of partnership funding).

- A focus on people rather than buildings with a target of 60-65% of the resources being used for revenue projects.

8.6 The Regional Plan Bulletin, March 2005 indicates that four rounds of applications will be undertaken with the final round taking place in June 2006.

8.7 **Awards for All** is a joint Lottery grants scheme which is aimed at local communities and can fund projects relating to sport, the environment and health in the local community. Funds are fairly small (between £3,000 and £10,000) and unsuitable for projects with property, building work or land improvement costs of more than £25,000. Priorities within the South West under this scheme include 'healthier lifestyles for the whole community' with walking and cycling projects identified as possible initiatives.

8.8 Okefreeriders, a mountain biking club based in Abbeyford Woods near Okehampton recently built a number of new trails with the aid of this grant and a volunteer group of trail builders. This may be a popular model (i.e. a local club building trails and attracting funding support) in a number of woodland areas across the South West.

8.9 The **Active England** lottery fund is now closed. This programme supported projects which encouraged more people to get involved in sports and physical activity and provided just over £750,000 of funding towards the Haldon Forest Park project.

8.10 **Exercise referral schemes** are relatively recent phenomena within health promotion schemes. They are available in a number of forms e.g. walking, cycling or gym based and seeks to support those who currently take little or no exercise to engage in regular activity. Funding for the schemes is through PCT's often in partnership with other organisations e.g. local authorities, cycling clubs etc. In some areas they have been funded through LEAP – Local Exercise Action Pilots, set up by PCT's in neighbourhood renewal areas.

8.11 One example of a successful scheme is the Teignbridge 'Cycle to your Hearts Content' scheme. This is a 10 week cycle programme where people are encouraged back into cycling as a form of exercise to improve their health and lifestyle. The programme is fully supervised and bikes are provided along with regular health assessments throughout the course.

8.12 The Countryside Agency has constructed a bid to the Big Lottery Fund's 'Wellbeing' funding stream with the theme of '**Green Exercise**'. Green exercise is described as including walking, cycling and conservation activities but also extending to any activity which takes place in the natural environment and is designed to increase the amount of physical activity taken by individuals. It has been proposed that a programme of work around health and the natural environment will be part of the future Nature England corporate strategy and include the promotion of physical activity in the outdoors.

8.13 It is hoped that a successful bid will generate funds to run a nationwide programme to encourage physical activity especially in hard to reach groups and deprived areas. Whilst the physical benefits of an active lifestyle and the mental health gains that come with physical activity are well established, there is a growing body of evidence which suggests that time spent in the 'great outdoors' can have positive effects on health. By providing facilities to walk, cycle and play people can be encouraged to be more active but a natural environment assists stress reduction and the improvement of mental health.

8.14 Historically the Countryside Agency has provided funding to other mountain biking development schemes e.g. Chase Trails and Cannock Chase. Funding has been obtained by volunteers (in this case the Chase Trails group) and has been used for signage, to produce information about the cycling areas and sensitivity issues and source aggregate materials from a local quarry. However the Countryside Agency became part of a new agency Natural England in October 2006. Natural England will integrate the Landscape, Access and Recreation division of the Countryside Agency with English Nature and most of Defra's Rural Development Service (RDS). Funding schemes will therefore be through this new organisation.

8.15 Other schemes will use funding from the Heritage Lottery fund e.g. the Neroche project in the Blackdown Hills. The Neroche scheme encompasses a wide range of elements including conservations, built environment and access issues. A key element is however the development of a number of circular trails for use by both walker and riders. The majority of grants available from the Heritage Lottery are community focused and ensure that people learn about, have access to, and enjoy their heritage.

Environment

8.16 The **English Woodland Grant Scheme (EWGS)** consists of 6 grants for the creation and stewardship of woodlands and is operated by the Forestry Commission. The objectives of the programme include: sustaining and increasing the public benefits derived from existing woodlands in England. Key targets of the scheme include expanding the area of woodland with public access and improving the environment of disadvantaged urban communities. Funding for the scheme is managed on a regional basis and grants are offered where they meet regional and national priorities.

8.17 As The South West Forestry Framework states that one of the key aims is to increase the contribution of woods and forests to leisure and tourism as part of the SW economy. Increased and better marketing of woodland opportunities is highlighted as an issue – development of stronger links with the brand clusters of SW Tourism's 'It's Adventure' and 'Close to Nature' are particularly noted. The potential and ability for woodland areas to become tourism destinations in their own right is also noted.

8.18 Under EWGS, the **Woodland Improvement Grant** (WIG) appears the most relevant grant for this study. This grant supports capital investment work which creates, enhances and sustains social, environmental and economic public benefits. Contributions towards the work vary between 50 and 80% depending on the type of work and region. Public access is one of the main types of work supported under this grant, specifically work to provide and improve the facilities for free public access where there is a need.

8.19 The **Environmental Stewardship** scheme is the new version of the Countryside Stewardship scheme operated through Defra. It is an agri-environment scheme which rewards farmers and other land managers in England who deliver effective environmental management on their land, and addresses some of the environmental issues affecting the wider countryside including diffuse pollution, soil erosion and conservation of farmland birds. The scheme consists of two levels of stewardship – Entry Level and Higher Level and its primary objectives are to:

- Conserve wildlife
- Maintain and enhance landscape quality and character
- Protect the historic environment and natural resources

8.20 Particularly relevant to this study is the objective of:

- Promoting public access and understanding of the countryside

8.21 Stewardship options require that owners comply with good farming practice on all land including compliance with the Forestry Act and Environmental Impact Assessment (Forestry) Regulations. Whether Entry or Higher Level Stewardship is more appropriate depends on individual landowners, locations and circumstances.

8.22 It is hoped that a successful bid will generate funds to run a nationwide programme to encourage physical activity especially in hard to reach groups and deprived areas. Whilst the physical benefits of an active lifestyle and the mental health gains that come with physical activity are well established, there is a growing body of evidence which suggests that time spent in the 'great outdoors' can have positive effects on our health. By providing facilities to walk, cycle and play people can be encouraged to be more active but being in nature assists stress reduction and the improvement of mental health.

Structural Funding

8.23 The next round of Structural Funding should be in place by 2007 and will run until 2013. Cornwall and the Isles of Scilly will be eligible for support from a Convergence programme. A Regional Competitiveness and Employment Objective will replace the current Objectives 2 & 3 and the South West will be eligible to receive funding under this Objective. According to the Draft National Strategic Framework, eligibility under the Objective will be up to the individual Programmes to decide.

8.24 There will be some differences between the Objective One and the Convergence programme. Objectives will include meeting the following priorities in line with the Gothenburg and Lisbon Agendas – sustainability, innovation, knowledge industries, competitiveness, social inclusion and worklessness.

8.25 The South West RDA will administer the Convergence and Competitiveness Programmes.

Economic Development

8.26 The South West RDA and some local authorities have provided support for economic development projects across the region. Typically the criteria have included the quantity and quality of employment provided and projects are assessed against the value for money they provide in delivering against these targets.

8.27 The South West RDA has targets against the following indicators[29]:

Main Indicators

- Job Creation – number of jobs created or safeguarded
- Employment Support – number of people assisted to get a job
- Business Creation – number of new businesses created and demonstrating growth after 12 months, and businesses attracted to the region
- Business Support – number of businesses assisted to improve their performance
- Number of businesses within the region engaged in new collaborations with the UK knowledge base (knowledge base/business collaboration)
- Regeneration – public and private regeneration infrastructure investment levered
- Brownfield reclaimed and/or redeveloped
- Skills – number of people helped with their skills development as a result of RDA programmes

  a. Number of adults gaining basic skills as part of the skills for life strategy

[29] SWRDA Corporate Plan 2005-8

b. Number of adults in the workforce who lack a full level 2 or equivalent qualification who are supported in achieving at least a full level 2 qualification or equivalent

Supplementary indicators

- Number of housing units
- Square metres of workspace – created or refurbished

8.28 Although there are exceptions, a rule of thumb is that £10,000 investment per job might be considered reasonable value for money. Projects in areas considered as priorities for regeneration and projects that deliver against other strategic priorities will be favoured. Tourism projects have been supported in the past and tourism is one of the RDA's priority sectors.

Planning Obligations

8.29 The continued house building across the region can provide the opportunity for developer contributions for access to open space, including cycling. This might include greenways providing access to woodland cycling facilities or might provide contributions to developing woodlands for off-road cycling.

8.30 Using developer contributions for these sorts of projects will require the relevant local authority to have identified a strategic need within the land use planning framework, and to have the determination to pursue these objectives with developers. Areas with the greatest development interest will have most leverage with developers.

8.31 Funding through planning obligations will compete with a host of other calls upon any money secured, such as education, employment projects, transport infrastructure health, libraries etc. Therefore it will be necessary to work with local authority planning departments to ensure that off-road cycling is built into the process.

Landfill Tax Credit

8.32 The Landfill Tax Credit Scheme (LTCS) was designed to help mitigate the effects of landfill upon local communities. Under the LTCS landfill operators can reduce their landfill tax liability by funding environmental or community projects. This includes the provision, maintenance or improvement of village halls. The LTCS is available to all village halls where the village hall is within 10 miles of a landfill operator's site who is participating in the scheme and is liable to pay landfill tax. The LTCS is regulated by ENTRUST who are charged with enrolling, monitoring and auditing the organisations who spend the monies. Landfill operators issue grants to organisations (environmental bodies) enrolled with ENTRUST.

8.33 The scheme will assist environmental and community projects designed to help mitigate the effects of landfill on local communities. The grant size is 6% of the landfill operator's landfill tax liability. Grants donated at the sole discretion of the landfill operator. The criteria are that recipients must be non-profit organisations, including non-charitable bodies. The organisation must not be controlled, directly or indirectly, by a local authority.

Sponsorship

8.34 Another key funding source for many of the existing mountain bike centre is private sector sponsorship. Deals with companies such as bike or food and drink retailers (e.g. Red Bull, Trek and Gary Fisher) are relatively common at biking events though more commonly advertising displayed around bike trails has enabled some funding for trail development. Sponsorship of this kind tends to be attracted to the 'lifestyle sports image' which some elements of mountain biking embody. Similar sponsorship is common at surfing, skateboarding and other lifestyle sports events.

Volunteers

8.35 Discussion earlier in this report has highlighted the importance of volunteer contributions. Volunteers are central to the development of member centres and are also significant in some of the specialist centres. It is clear that off-road cycling can attract enough volunteers to provide an important element of many schemes.

Summary

8.36 The key sources of funding for previous cycle based projects have been Lottery and Structural programmes. Other potential sources include the English Woodland Grant Scheme and economic development funding from organisations such as the South West RDA. There may also be opportunities through Planning Obligations, depending on the local authority, Landfill Tax Credits and private sponsorship.

8.37 Dialogue with potential funding providers is an important element of the feasibility process and should be encouraged from the earliest opportunity.

9 RECOMMENDED OPTION

Introduction

9.1 The sustainable development framework discussed earlier in the document provides a broad basis for assessing options based on environmental, economic and social development factors.

9.2 The discussion about the different options clearly showed that within the variety of impacts each produced, there are some defining characteristics:

- Specialist centres are most likely to have a regional economic impact through attracting high volumes of use including new visitors to the region. There will also be an impact through building the profile of the region and its natural environment. The specialist centres are likely to have identifiable, focused local economic impacts including direct employment on site and employment in associated local businesses. Specialist centres can also provide health and community benefits and through the volumes of use, may be able to introduce car-free access schemes. Although specialist centres are relatively expensive the concentration and range of impacts may make them value for money
- Development of geographic hubs through information, way marking and joint promotion will also bring economic benefits, although on a more diffused and local scale. The locations are often more remote and fragile, and development of these locations will be partly to build demand and partly to manage use away from the most environmentally vulnerable areas. However, while the benefits may be less, the costs are also much less
- Member centres allow latent demand to be catered for at a local level. Much of this activity is likely to take place without external intervention although assistance will help to grow participation and general activity rates with relatively little cost
- The development of sites adjacent to urban areas have the most potential where cycling facilities are developed alongside other leisure facilities as a facility primarily for the local population

9.3 The sustainable development objectives for woodland cycling considered different elements of environmental, economic and social development. The assessment of the different development options clearly showed that the specialist centre was more likely to meet the majority of criteria. The surrounding discussion also indicated that the specialist centres are the most expensive to develop. The development of informal centres produces some benefits and allows better management of an activity that is likely to take place anyway with relatively little intervention. Member centre development allows local benefits with relatively little intervention and centres adjacent to large population centres can provide similar benefits to specialist centres but will depend on building on other suitable facilities.

9.4 These arguments clearly indicate that the recommended development option should include:

- Development of a specialist centre
- Development of a network of geographic hubs and
- Development of local member centres

9.5 While it may be possible to develop all of these elements concurrently, a phased approach would work. Essentially funding, site availability/appropriateness and stakeholder agreement will all be key determinants in developing the elements of the recommended option.

Preferred Option Components

Preferred Option Part 1 – Specialist Centre

9.6 The development of a specialist centre would be an appropriate way forward because.

- Usage rates are higher – potential higher economic impact benefits
- They offer clearer 'certainties' to users through way marked trails and supporting facilities, and this makes them attractive to a broader market
- They can be developed on more robust locations; therefore potential environmental impacts are lower.

9.7 The analysis of the supply of woodland cycling locations showed the geographical distribution of specialist cycling centres has a gap in provision in Cornwall. Despite a locally keen market (there are a number of local clubs who are keen to be involved within trail building schemes), a large tourist population and clear links with the outdoor, adventure lifestyle brand which forms part of the 'Its Adventure' brand cluster (mountain biking fits well with the surf, outdoor image of the area) there is no clearly identifiable focus for mountain biking in the area.

Potential Location

9.8 The discussion with clubs, land managers and other stakeholders has suggested that within Cornwall the area around Bodmin may be suitable as a possible location:

- The Camel Trail Partnership have recently produced a strategy which recognised the overall success of the Camel Trail but picked up on some issues (e.g. high use of the Trail in some locations and less in others, way marking etc.) and also identifies a series of potential new markets for the Trail which link directly into the Towards 2015 brand clusters. One of these potential markets is 'serious cycling enthusiasts including adventure sport and mountain bike users'
- It is recognised that promotion to this target audience could link into a wider project to utilise the woodlands close to Bodmin to encourage their wider recreational use by walkers, equestrians, cyclists and locals and it is noted that the woodlands could also be developed as a mountain bike destination with a series of off-road routes. As the Camel Trail strategy identifies, the mountain bike trails would attract a new type of user and are likely to be popular year round. Bishops, Hustyn and Grogley Woods (all Forestry Commission owned) are identified for the potential development of trails and a trail centre
- The area offers the following advantages:
    - Local and tourism demand
    - Already offers a very popular family orientated cycle route
    - The area and idea has links with the lifestyle brand (adventure tourism) which is already marketed in this location
    - Available woodland with suitable topography
    - Willing landowner
    - Potential to draw down structural funds to assist in the development of trails/centre
- Within this area, Cardinham Wood may be a suitable location:
    - There is an existing infrastructure in-place (car parking, café, way marked trails etc) which could be developed
    - There are good inbound transport links that do not involve taking traffic into Bodmin (already a traffic bottleneck). The A30 & A38; Bodmin Parkway Station is close by, giving access by train and there are bus routes on the A38

    - Proximity to the Bodmin end of the Camel Trail. There are some obvious issues to resolve, particularly linking the site to the Camel Trail. It will be necessary to address the site access issues and identify any potential conflicts with the local residents and other user groups (e.g. walkers)

- However, development on this site is unlikely to significantly deal with any issues of social inclusion as its primary audiences will probably be staying tourists and local residents with access to a car

9.9 Development of a specialist centre on the outskirts of Plymouth is another possibility. Location near a large urban centre is an important factor within the success of a specialist centre. The current plans for the development of mountain bike facilities within the Tamar Valley Mining Heritage Project are likely to deliver a specialist centre suitable for Plymouth. The Tamar Valley has road and rail links with Plymouth and a large part of the necessary cycling infrastructure will be developed by the Mining Heritage Project. This site does have the potential to address some of the social inclusion issues given its proximity to Plymouth and its public transport links with the city.

9.10 Another possibility is the Purbeck area, which is an established visitor destination, close to Bournemouth and Poole and already has a profile as a cycling location within the enthusiasts market. However individual sites have not been identified for Purbeck.

9.11 The significant demand potential from the resident population within the north east of the region also suggests that should a site be found, there is likely to be the demand to create a viable centre.

9.12 Costs for the development of a specialist centre are in the region of £2 million for a facility on the scale of Haldon Forest Park plus refreshment and hire facilities.

Preferred Option Part 2 – Network of Geographic Hubs

9.13 Increasing the potential of the network of geographic hubs within the region is the second component of the preferred option.

9.14 The approach is a lower cost option than the development of a specialist centre and whilst the returns (both economically and socially) may also be lower, there are many advantages to such an approach.

- Many of the sites are already used for mountain biking, primarily by the enthusiast market. Way marking of trails in these locations would increase their appeal to more novice riders thereby widening the market for these sites and increasing potential local economic benefits.
- Harmonising the marketing of a range of these sites would also provide a unified regional approach and encourage users to visit other similarly branded sites (in a similar way to the 7 Stanes scheme).
- The promotion of these sites links easily to the 'Its Adventure' brand cluster

9.15 It will be necessary to consider the environmental impacts of a growth in these locations when developing geographic hubs. Environmental damage to sensitive landscapes is an important consideration but there is the opportunity to use this process to manage current and future use towards the more robust parts of the chosen locations and to facilitate greater economic benefit through use of local facilities.

9.16 Suitable locations are likely to include the existing Geographic Hubs such as the Mendips, Dartmoor, Exmoor, the Quantocks and the Purbecks. Other areas might include Woodbury and Cardinham. Linking these locations as part of a network approach would strengthen this option. Previous work[30] indicated that Cardinham Woods and Great Wood in the Quantocks were suitable locations for this type of development as part of a strategic mountain bike product within the South West. Landowners will need to be contacted at an early stage of this process.

9.17 The eventual choice of locations to develop cycling facilities will need to be taken through a coordinated strategic process which considers sensitive landscape issues as well as demand and local development opportunities. Development to build cycling at one location can serve to displace demand from sensitive locations elsewhere. This is particularly important for some AONBs, where as well as moving activity within an AONB, development can serve to move activity between AONBs.

9.18 Costs of this approach would depend on the scale of the geographic hubs network identified and the degree of way marking and scale of promotional/marketing material. Some formalised environmental impact assessment work may also be necessary. Indicative costs from the Cannock Chase case study identified that the production of educational/marketing material was in the region of £10,000. Signage costs were in the region of £10,000 although this clearly depends on the amount of way marking required and the type of signage developed.

9.19 We have assumed that a target of 10 geographic hubs should be developed (of which some will be in the hub locations already identified), at a total cost of £200,000. To keep within this budget the chosen locations will already have trails, car parks etc. and the main development aspect will be the signage and information.

Preferred Option Part 3 – Local Member Centres

9.20 Research for this study has consistently identified a demand for use of individual sites by groups of users on a local basis. This and the review of case studies such as Okeford Hill and Woodland Riders in the Tamar Valley led to the characterisation of the local member centre model. There is further demand for centres such as this within the region and therefore this comprises the final element of the recommended development option.

9.21 Whilst the economic impact of these schemes is limited, they provide important assets to the local cycling population, increase demand in the local area (clubs have grown substantially over time) and have provided environmental benefits through formalising and managing the development of illegal trails.

9.22 Development of a template approach to assist clubs and landowners to develop local member centres would include issues such as IMBA membership and contracts between clubs and landowners, plus advice on funding opportunities.

9.23 There is identified demand for local centres in Cornwall (Stowe Woods), Mendips (Rowberrow, Stock Hill, East Harptree) and Quantocks (Great Wood).

9.24 The costs of this approach are minimal and typically met by the individual clubs. Construction costs of trail building will vary dependant on terrain and distance developed. The Dafyd Davis report suggests costs might range from £4 per metre to £20 per metre. If a mid point of £12 pre metre is applied to a nominal six centres each developing eight kilometres of trail, this would total £576,000. Some of these costs may be hidden through the use of volunteer club labour. Guidance for setting up these centres can be obtained from IMBA and CTC.

Other Associated Opportunities

9.25 In some locations there may be benefits from adding some specific graded trails to existing bridleway networks. These can be used to focus use on suitable locations and could also be used to build economic benefits. Even relatively small areas of

[30] Dafyd Davis, Mountain Biking in the Peninsula Forest District

woodland can add an additional few kilometres to a route and increase opportunities for creating interesting trails. There are areas on Exmoor and the Quantocks where some further provision may be possible on Forestry Commission sites.

9.26 In areas with good Public Rights of Way networks e.g. Exmoor and Purbeck there is a commercial tourism opportunity through offering off road biking guiding and tuition in tandem with accommodation as part of a short break package.

Branding

9.27 There is a role for the development of an umbrella South West 'Cycling Brand' to link and add value to existing facilities or build the demand for new facilities. Within the umbrella brand woodland cycling would be a tier. The brand development can be seen as a stand alone project that is not dependent upon new woodland cycling facilities. The brand would be used as part of coordinated marketing approach for off-road cycling in woodlands throughout the region.

9.28 The recommendation is that the branding should be developed to provide an identity for woodland cycling in the region. This brand would be used as an umbrella tool to add value to marketing and PR activity for all individual centres.

9.29 It is anticipated that the use of this brand would be linked to quality. This would include use of the standard grading system for trails developed through IMBA, adherence to appropriate health and safety standards, requisite liability insurance and the provision of facilities appropriate to the volume and type of use. The use of the brand would also depend on meeting environmental quality standards (e.g. protecting fragile landscapes) and actions to minimise the environmental impact of users travel to centres. It is likely that the policing of these standards would have to be through some partnership between bodies such as IMBA, South West Tourism and Natural England.

9.30 The brand would be used by private sector, clubs and the public sector providing woodland cycling facilities.

9.31 It is estimated that in order to develop and launch this brand a budget of at least £50,000 to £60,000 would be required. This budget would cover costs associated with branding and marketing consultancy; brand design; market research; website design and development. There may be a role for public sector intervention to start this process.

9.32 A further revenue budget would be required to support on-going marketing and PR activity. It is not possible to include detailed estimates of the costs associated with this stream of on-going activity as they are entirely dependent upon the development of a comprehensive marketing communications strategy. Early discussions are recommended between South West Tourism, Woodland Renaissance and major woodland landowners to develop, deliver and implement a brand for woodland cycling.

9.33 In order to take this forward it is recommended that a marketing group is formed. This group would include facilities operators, cycling clubs, cycling organisations and tourism organisations. This group would need to maintain regular dialogue with organisations seeking to develop new facilities in the region as well as the organisations managing the existing Focal and Geographic cycling Hubs.

9.34 The benefits of involving a cross section of stakeholders is that the branding work will cover all the necessary attributes and provide a network for communication with a wider constituency of stakeholders. The marketing and interpretation group formed by the Cornwall and West Devon WHS Bid Partnership provides a model.

9.35 The brand should build upon the work already undertaken by South West RDA and South West Tourism developing the South West England Brand[31].

Supporting Recommendations

9.36 Development of the preferred option will require a number of supporting recommendations. These comprise:

- Use of industry standard trail grading and accreditation for all public and private way marked/promoted facilities
- A programme of counts should be instigated/extended at all hubs. All data should be collaborated in order to collate a regional overview in relation to off road cyclists. This would improve the availability of baseline data, increase understanding and provide useful for any future funding applications
- A detailed feasibility study to be carried out for any new specialist centre. This might include an initial analysis of specific locations and then a detailed assessment of the chosen site(s). All proposals should be assessed against the options appraisal framework. Landowners will need to be contacted at an early stage of this process
- Stakeholder consultations should be undertaken for potential proposals/sites including those specifically identified
- Explore networking/branding possibilities with existing high profile cycling centres e.g. those in Wales and Scotland
- Use the common trail grading systems to complement any combined branding of multiple centres e.g. joint promotion branding of Dartmoor, Exmoor and the Quantocks. There may also be potential for linking some of these routes as a grand circuit/long distance trail on the style of the South West Coast Path
- Facilitate networking amongst clubs and landowners to explore licensing of woodlands to clubs for development of routes. This may be part of a new specific Woodland Renaissance programme. Landowners will need to be contacted at an early stage of this process
- Explore the possible development of a template approach for those interested in developing a local club and developing trails – this should cover landowner, club and IMBA requirements. This may also be part of a new specific Woodland Renaissance programme
- Development of IMBA website to back up dialogue between clubs and landowners including liability /insurance issues
- Agreement with stakeholders regarding the best mechanisms for marketing off-road cycling in woodlands e.g. web based, print, PR etc.
- Use Rights of Way Improvement Plans to improve the rights of way network open to cyclists and to provide additional route marking and information. Councils have a statutory duty to produce these and there are funding opportunities that can be linked to them e.g. Local Area Agreements. The bridleway network is a key ingredient in the success of many sites and maintenance of these networks is therefore key to the continued success of these sites
- Consider how bridleways and other low-traffic routes can be used to link informal and formal cycling centres with urban areas and public transport nodes in order to provide car-free access for cycling

[31] http://www.southwestbrand.info/

- Undertake discussions with a selection of local authority sport, leisure and recreation officers to explore opportunities to build social and health benefits from off-road cycling in woodlands. In due course these discussions may include health promotion organisations. Discussions should be targeted towards areas with opportunities to cycle in woodlands
- Map out the typical annual programme of events to consider whether there is potential to build and coordinate the programme to raise the profile of the South West as an off road cycling location. This would also explore the opportunity to use some events as income generating opportunities for clubs and landowners in order to develop facilities
- Undertake further research amongst existing and potential visitors to the region to confirm the current off-road cycling demand, how this might grow and the factors that might prompt new demand from this market

Summary

9.37 The preferred option is the development of a combination of elements:

- One specialist centre to provide profile and economic benefits at a cost of around £2 million and to include deprived communities
- A set of 10 informal centres to be waymarked and information provided at a cost of between £200,000 and £400,000 in order to serve the enthusiasts market, provide some facilities for family cycling and direct people away from sensitive areas and towards locations where there are opportunities for economic benefits
- The development of six member centres each developing 8 kilometres of trail, at a cost of £576,000, serving the local enthusiasts market

9.38 The preferred option has a total budget of £2.8 million. The costs of developing this option may be another £500,000 once staff time and feasibility studies are undertaken, and it is possible that extra-ordinary circumstances will result in a need for up to £500,000 contingency. This suggests a total budget allowance of £3.8 million.

9.39 In order to take this option forward there is a set of supporting recommendations which include:

- Adoption of industry standard trail assessment and accreditation
- Exploration of the most suitable locations for these developments and detailed feasibility studies for each one
- Development of a dedicated brand to link the facilities and, though provision of information, encourage the spread of use and benefits from the woodland cycling locations
- Development of networks to foster communication between landowners and cyclists