

THE STRATEGY FOR SCOTTISH MOUNTAIN BIKING, 2019-2025

LEADING EUROPEAN MOUNTAIN BIKING



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Ministerial Foreword

As Cabinet Secretary for Culture, Tourism and External Affairs I was delighted to be asked to provide the foreword to what will be Scotland's second National Mountain Biking Strategy.

The strategy's aims align well with a number of Scottish Government objectives. Our Economic Strategy highlights tourism as one of Scotland's Key Growth sectors and we are committed to supporting the sector to grow sustainably. Related to this, in recent years, we have seen rising global demand specifically for adventure tourism and our National Tourism Strategy identifies adventure tourism, based on our wonderful natural environment, as a market with significant growth potential.

Mountain biking is of course a key pillar of that adventure tourism market and here in Scotland we are in a unique position. We have purpose-built and natural trails available, free of charge, through our land access legislation and we also have the well-established Mountain Biking Consortium which brings together members of the industry and the public sector who have been responsible for the development of this strategy.

It is clear that Scottish mountain biking is already impacting on our economy with £105m GVA (Gross Value Add) generated from mountain biking activity in 2015 alone. But there is room to do more and I welcome the strategy's commitment to increase the economic impact of mountain biking through tourism and product development.

Mountain biking related events are significantly contributing towards this total and they are having a positive impact in our rural areas. The UCI World Championship event, which is regularly held in Fort William, has grown from small beginnings: in 2017 it attracted over 23,000 spectators to Fort William generating £3.5m GVA in the local economy.

In recent years we have shown Europe and the rest of the world that we are a nation proud of its sport, its athletes and its ability to deliver a first class visitor experience. We hosted the Commonwealth Games in Glasgow in 2014 and in 2018, we successfully played host to the first ever European Championships which brought together a variety of sporting disciplines. I believe that by hosting both of these events, which included multiple cycling disciplines, we have demonstrated that we are



committed to supporting sports development in Scotland and our Scottish athletes.

We want to continue this success and we are delighted to support the UCI Cycling World Championships to come to Scotland in 2023. The bold and innovative approach we have taken means that this will be the first time ever that all the cycling disciplines have been brought together to take place at the same time in the one country – that's 13 cycling world championships in the space of 2 weeks. Not only will this be a great festival of cycling to be enjoyed by Scots and international visitors alike, but it affords us an opportunity to use the profile of such a prestigious major event to drive beneficial changes around sustainable transport, active lifestyles, our environment and our economy.

Our vision is of a Scotland where more people are more active, more often and physical activity is one of the best things we can do to improve both our physical and mental health. That is why this strategy will also have a significant focus on increasing participation, to ensure that the mountain biking sector is welcoming and inclusive.

And of course, we mustn't forget that first and foremost, mountain biking is a sport and we are committed to supporting sport in Scotland through **sportscotland** and the national governing body, Scottish Cycling.

So I welcome the strategy's threefold aim to increase participation, to support developing athletes and to increase the economic contribution of the sector to the wider Scottish economy and I would encourage as many of you as possible to support the strategy's implementation through your own work or through work with the Mountain Biking Consortium, Developing Mountain Biking in Scotland and the Mountain Biking Centre of Scotland.

Fiona Hyslop MSP

Cabinet Secretary for Culture, Tourism and External Affairs

Introduction

Welcome to the Scottish Mountain Biking Strategy for 2019-2025. It sets out an inspiring and ambitious vision for mountain biking in Scotland over the next six years and beyond.

Image by: Ross Bell

As a strategy for a nation, it has been developed on behalf of all those with a stake in Scottish mountain biking, whether they be riders, the tourism industry, or product designers and manufacturers.

And here ‘mountain biking’, means not just competitive racing and the extreme aspects of the sport, but everyone who cycles off-road in Scotland – whether they do it alone or with friends or family, and whether they are Scottish residents or visitors.

The strategy has been developed in the context of cross-sectoral policies, and through interactions with riders, businesses, land-owners and all the national agencies and cycling organisations involved in mountain biking. These bodies are represented on the MTB Consortium which has overseen the previous national strategic frameworks and steers Developing Mountain Biking in Scotland (DMBinS), hosted by Scottish Cycling since 2009.

The strategy aims to deliver against three key objectives:

- ✓ TO INCREASE PARTICIPATION IN MOUNTAIN BIKING
- ✓ TO ACHIEVE SPORTING SUCCESS
- ✓ TO INCREASE THE ECONOMIC IMPACT THROUGH TOURISM AND PRODUCT DEVELOPMENT

It shows how to deliver these objectives in a sustainable way, taking account of potential negative impacts such as environmental concerns, interactions with other users and landowner liability.

This is a high aim, but deliberately so. The strategy outlines the actions required from all those interested in reaching it, whether they be riders, agencies, local or national government. It also describes a way to ensure that strategic support for mountain biking can continue in the longer term, reducing the risk of over-reliance on continuing public sector investment.

In the next section we outline some of the many measurable benefits that mountain biking can deliver. And let’s not forget an intangible one that’s just as important: simply making people happier.

However people choose to take part in mountain biking, they do so because they enjoy it, and we keep that fact in sharp focus when setting out the vision for the future.

We hope that you will be part of it.

THE PARTNERS OF THE MTB CONSORTIUM

Forestry and Land Scotland
Scottish Forestry

Scottish Cycling
Scottish Enterprise
Scottish Natural Heritage

sportscotland
Cycling UK (Scotland)
Cycling Scotland

Edinburgh Napier University
EventScotland
Highlands and Islands Enterprise

Mountain Bike Centre of Scotland
Scottish Land & Estates
VisitScotland

SEE PAGES 38-39 FOR THEIR CONTRIBUTIONS

The vision

Scotland to be recognised as the leader of European mountain biking through innovative product development and tourism, participation and sport development, and sustainable trail development and management.

To realise the vision we have set some specific and ambitious goals...



The mission

TWO MILLION ANNUAL VISITS TO THE SCOTTISH OUTDOORS ON A MOUNTAIN BIKE AN INCREASE OF 33%.

A WORLD CHAMPION OR WORLD SERIES WINNER IN EVERY MOUNTAIN BIKE DISCIPLINE.

INCREASE MOUNTAIN BIKING'S ANNUAL TOTAL ECONOMIC GVA CONTRIBUTION TO £158M BY 2025 AN INCREASE OF 51%.



A WORLD-CLASS TRAIL NETWORK



THE INTERNATIONAL DESTINATION OF CHOICE



A LEADER IN MTB INNOVATION



TACKLING SCOTLAND'S ISSUES OF HEALTH AND WELLBEING



SCOTS ACHIEVING ON THE WORLD STAGE

The background

The opportunity in Scotland is huge. Globally, adventure tourism is growing fast: it is valued at \$445bn with the potential to grow to \$1,335bn by 2023¹, and Scotland's national tourism strategy identifies it as a market with significant growth potential.

Mountain biking is a key component of adventure tourism – indeed the Scottish Government's 'Programme for Government' identifies it as one of the three most important components of outdoor tourism, alongside golf and marine tourism.

And it is not only in tourism that mountain biking makes an important economic contribution. It is estimated that the global market for bike products will be worth \$65billion by 2025. The market for e-bikes alone could be worth \$25billion by that time. Scotland is now in a strong position to capitalise on this growth market, largely due to the support of the Mountain Bike Centre of Scotland (MTBCOS), an innovation project hosted by Edinburgh Napier University. Indeed, through their support, the number of product development companies across Scotland is already growing.

As a relatively new arrival, however, mountain biking has so far received only limited investment, and it could certainly contribute much more to the Scottish economy. Using the standard GVA measure for economic impact, mountain biking contributed £105m in 2015. With the right strategic investment and support this could rise to £158m by 2025².

Mountain biking can also do much for the nation's physical and mental health, particularly by broadening participation and thus reducing some of Scotland's health inequalities. The Scottish Government's physical activity strategy, 'A More Active Scotland: Scotland's Physical Activity Delivery Plan', highlights the work of DMBinS, and a range of delivery partners, in helping to create the infrastructure that provides everyone in Scotland with more opportunities to be active.

The environmental benefits are also clear, both in terms of encouraging people to appreciate Scotland's natural environment and in promoting greener forms of transport.

Mountain biking in Scotland has made a great deal of progress in the last decade, and much of that is due to the work of the partners of the DMBinS project since its inception in December 2009.

Although this document is firmly focused on the future, all of the ideas and insights it presents are built on the experience gained since that date, including the work done to deliver the strategic framework which was set out in 2010 and refreshed in 2016.

Some high-profile projects have been delivered, such as the award-winning Scottish Mountain Biking Conference supported principally by VisitScotland and Cairngorms National Park Authority, which has grown to be the largest mountain bike conference in Europe and is a focal point for everyone involved in mountain biking in Scotland. Another is the new innovation centre opened in 2014 with Edinburgh Napier University and Scottish Enterprise – the MTBCOS. It has brought together academia and business with impressive results.

Just as important as these headline-grabbing schemes are the many smaller – but nevertheless exciting and sustainable – initiatives in which the project has worked together with community groups, clubs, schools, governing bodies of the sport, local authorities and businesses. These partners have come from different areas spanning recreation, tourism, enterprise, land management and many more. Together they have greatly developed the trail network; increased participation; supported elite events; encouraged tourism to Scotland; promoted responsible biking; launched new products and services; and created new and lasting partnerships.

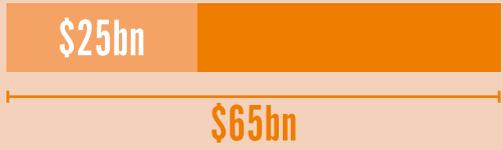
Scottish taxpayers have invested financially in mountain biking through public agency funding; the partners and other stakeholders involved in mountain biking have given their time, imagination, skills and energy. Together we have given taxpayers a considerable return on their investments.

Globally, adventure tourism is valued at \$445bn with the potential to grow to

\$1,335bn
BY 2023¹.



It is estimated that the global market for bike products will be worth \$65billion by 2025. The market for e-bikes alone could be worth \$25billion by that time.

\$25bn 

\$65bn

2015 **\$105m**

2025 **\$158m**

Mountain biking contributed £105m in 2015. With the right strategic investment and support this could rise to £158m by 2025².



To find out more about how, read the **DMBinS ‘Project Report 2015-2018’**, which gives details of several representative projects, and provides a progress update on the Framework for Action that was outlined in the 2016 strategy refresh.

We believe we have demonstrated that this partnership approach works. The working model is an innovative one. It brings together partners from the many different areas noted above, but even more importantly, it encourages each partner to think outside its own

particular area of focus, and to consider the wider opportunities for all. So although some of the projects may involve only one of our partners, the intention is always to bring the broadest possible range of benefits. As a result, mountain biking contributes to no less than ten of the Scottish Government’s National Performance Outcomes.

In short, the strategy outlined here will help to make Scotland wealthier, fairer, healthier, greener – and much more.

¹ <https://www.prnewswire.com/news-releases/global-adventure-tourism-market-expected-to-reach-1335738-million-by-2023-allied-market-research-672335923.html>

² Frontline Ltd Report – Estimating the Holistic Value of Scotland’s Mountain Bike Sector (November 2016).

How the mission fits with Scottish Government policy

The strategy for Scottish Mountain Biking from 2019 is designed to work towards the Scottish Government's strategies and policies in every relevant area.

IT FITS WITH MANY RECENT STRATEGIES AND INITIATIVES

ONE SCOTLAND – A PROGRAMME FOR GOVERNMENT 2018-19 (SCOTTISH GOVERNMENT, 2018)

Creating economic sustainability; valuing our natural capital; tackling physical inactivity, with a particular focus on encouraging more women and girls to take part in sport.

THE CHRISTIE COMMISSION ON PUBLIC SECTOR REFORM

Public sector services working more effectively together; preventative action; tackling inequalities.

THE PHYSICAL ACTIVITY DELIVERY PLAN FOR SCOTLAND

Increasing participation in mountain biking can contribute across all Active Scotland outcomes, particularly Outcome 4 (improve our active infrastructure – people and places).

NATIONAL PLANNING FRAMEWORK 3 (2014)

The Central Scotland Green Network and the National Walking & Cycling Network are National Developments.

SCOTLAND'S FORESTRY STRATEGY 2019 – 2029

Ensuring that more people benefit directly or indirectly from Scotland's forests and woodlands, through improvements to health, well-being, quality of life and life chances, or economic returns.

LONG-TERM VISION FOR ACTIVE TRAVEL IN SCOTLAND – 2030 (TRANSPORT SCOTLAND, 2014)

Encouraging more people to cycle for leisure, sport and travel.

CYCLING ACTION PLAN FOR SCOTLAND (2013)

Promoting cycling for young people for leisure, travel and fun.

THE NATIONAL STRATEGY: TOURISM 2020

Nature and Activities (mountain biking/cycling is the second most popular outdoor activity in Scotland).

SCOTLAND'S ECONOMIC STRATEGY (MARCH 2015)

Creating a more successful country, with opportunities for all of Scotland to flourish, by increasing sustainable economic growth through innovation, investment, internationalisation and inclusive growth.



IT CONTRIBUTES TO 10 OF THE SCOTTISH GOVERNMENT'S NATIONAL PERFORMANCE OUTCOMES

BUSINESS

Growing Scottish tourism by making Scotland the mountain biking capital of Europe.

Helping companies to develop bike products.

Developing the rural economy and promoting inclusive growth.

Increasing internationalisation through exporting and inbound tourism.

Encouraging inward Investment.

RESEARCH & INNOVATION

Better engagement between mountain biking businesses and academia.

Continuing growth of excellence programmes.

More pathways for students with a mountain biking background to progress from further education into higher education.

Further developing the Mountain Bike Centre of Scotland as a centre for innovation and excellence.

Developing the fast-growing e-bikes sector, including its supply chain.

EMPLOYMENT OPPORTUNITIES

Supporting sustainable economic growth by providing job opportunities in the MTB sector and its broader supply chain.

HEALTHIER LIVES

Greater participation means more physical activity.

Creating a world class network of leaders, coaches and instructors.

CHILDREN, YOUNG PEOPLE & FAMILIES

Improving people's perception of their neighbourhoods.

More volunteering opportunities encourages connections between generations.

SUSTAINABLE PLACES

Increasing use of bikes for active travel.

Sustainable development of MTB facilities.

Regional clusters used to spread good practice and identify joint working initiatives to improve local environments.

COMMUNITIES

Increased number of mountain biking clubs and informal groups, contributing towards healthier and stronger communities.

Regional clusters provide a focus for local communities to work together.

ENVIRONMENT

More people accessing the outdoors responsibly.

Sustainably built and managed trails.

More opportunities to volunteer in trail repair and maintenance, which helps to sustain trail networks.

NATIONAL IDENTITY

Pride in Scotland's status as a world-class nation for mountain biking.

Opportunities for Scots to succeed on the world stage.

INEQUALITIES

Reducing health inequalities by increasing participation in mountain biking, particularly in areas of deprivation.

How we will achieve the vision

Over the last nine years the MTB Consortium has shown that great results can be achieved by bringing people together behind a well thought-out strategy that delivers benefits for everyone.

This strategy will continue that approach: DMBinS – hosted by Scottish Cycling – will lead by energising, co-ordinating and providing support for delivery through its various partners. Its wide-ranging connections help to bring people together to form new and effective partnerships. Its passion and commitment drive new ideas forward. And the status and credibility that it and MTBCOS have built up help to attract new investment from a wide variety of sources. This co-ordination and collaboration applies at national, regional and local levels. Regionally and locally, by forming five Clusters we have greatly improved communication and project delivery. This success will be built on over the next six years – indeed this work has already begun with the appointment of two Regional Co-ordinators.

At a national level, the partners of the MTB Consortium have worked together to ensure that the effort and funding that each has invested has produced the biggest and most widespread impact possible. Again, this approach will be continued and developed further.

The delivery of this strategy will inevitably be reliant on the key roles of two distinct groupings.

There will be the engagement, funding, support and delivery of bodies involved in the MTB Consortium. These include Forestry and Land Scotland (formerly Forest Enterprise Scotland), alongside Scottish Land and Estates; Scottish Natural Heritage; Scottish Enterprise, Highlands and Islands Enterprise and the new South of Scotland Economic Partnership; VisitScotland and EventScotland; **sportscotland**; Scottish Cycling and the other national cycling bodies; Edinburgh Napier University and other associated universities and colleges. To this we can add the efforts and inspiration of Destination Management Organisations in key areas, and of a range of direct and supply chain businesses.



Image by: Sam Stills



The community of riders is the second grouping who are deeply committed to mountain biking. Very many of them are keen to volunteer their time, ideas and experience to improve mountain biking for others and to introduce it to new participants. So, as always, people are our greatest asset of all.

The strategy's success will be determined by how, and to what extent, the riders and the MTB Consortium, supported by the Scottish Government, find themselves able to accept the challenge. Their willingness to do so is a given.



Creating a sustainable future for MTB support

Broadly speaking, two categories of people in mountain biking benefit from support for its development: riders and businesses (both those focused on tourism and those which provide bike-related products and services).

All of them need and deserve a stable strategic mechanism that enables effective championing for investment into the sector, long-term planning and development.

The core of the vision for this is a national body that works through appropriate and targeted regional and local Clusters. This will provide impetus to all activity in the sector, bring together people

and organisations from different areas, and provide guidance and support. Although this concept requires further thought, consultation and market research, it provides a potentially strong model with many clear benefits to both riders and businesses.

Here are just a few examples of what such a body could do.

WORK THAT BENEFITS RIDERS

Advice, guidance, strategic support and influence that helps funders to develop new mountain bike trails and maintain/improve existing ones.

Support trails associations.

Promote responsible mountain biking and the access rights of mountain bikers.

Work with path builders to ensure that paths, particularly in upland areas, are built with 'bike in mind'.

Represent riders to national forums, groups and organisations such as National Access Forum.

Work with Forestry and Land Scotland and Scottish Natural Heritage.

Support events not otherwise supported by Scottish Cycling.

Lobby for increased public transport to the main mountain bike destinations.

Support under-represented groups.

Work with Scottish Cycling to develop an integrated and effective calendar of races and events for all mountain bikers.

WORK THAT BENEFITS BUSINESSES

Represent the sector to key stakeholders.

Offer innovation workshops, industry seminars and CPD opportunities.

Lobby for increased support for key strategic mountain bike projects.

Create opportunities for businesses to engage with academia.

Work with Scottish Development International (SDI) to help businesses to expand overseas.

Work with Higher and Further Education bodies to create a trained and professional workforce.

Create a presence at the business incubation centre to be built in the Tweed Valley.

Support promotions aimed at our rider membership base.

Promote Scotland as a global MTB destination.

All of this requires a stable financial model. With all these benefits – and more – we believe that a proposed central body could be supported in the medium- to long-term with a membership or campaign model in which both riders and businesses pay an annual subscription.



THE KEY THEMES

Five areas have been identified in which to focus everyone's efforts.



A WORLD-CLASS TRAIL NETWORK



THE INTERNATIONAL DESTINATION OF CHOICE



A LEADER IN MTB INNOVATION



TACKLING SCOTLAND'S ISSUES OF HEALTH AND WELLBEING



SCOTS ACHIEVING ON THE WORLD STAGE

Each of these themes shares common ground with a different mix of Scottish government policy objectives. Together they add up to a sustainable future for Scottish mountain biking, with an exceptionally wide range of benefits in many areas as well as sport, including health, the economy, business and innovation, rural affairs, the natural environment and tourism.



A world-class trail network

Clearly, the trail network is essential. Without it there can be no mountain biking. To be truly world-class, the trail network must be varied, well mapped, well maintained, easy to access, suitable for riders of all abilities, and located in strategic destinations which have greatest potential to meet our key objectives.

Scotland is fortunate in having many natural trails and paths, and there has been great progress in developing the purpose-built network in both urban and rural areas of the country, thanks to the work of Forestry and Land Scotland, land managers and public agencies.

In short, much good work has already been done: this needs to be maintained and built on.

Over the last decade, most of the funded new trail infrastructure has been built to bring new people into our sport. This has been successful: the participation base and the club network have grown. Continuing to maintain and develop new entry-level trails is vital to retaining and growing the base and network. However, the focus on developing entry-level facilities has left a vacuum at the top end of the sport, which in turn has led to many challenging trails being built by riders without landowners' permission. In 2018, the National Access Forum released guidance which provides a framework for mountain bikers to work together with landowners to mitigate against any issues caused by these trails, and to ensure that the benefits of the trails are maintained and potentially developed.

There is a great need to establish a culture of trail stewardship from riders. Where appropriate, the MTB community needs to

help landowners to manage these trails, and also help to stop inappropriate trail building. This culture change will require support; DMBinS will be tasked to continue a methodical and strategic approach to support riders to set up trails associations, each with responsibility for the stewardship of trails in its local area.

A recent trend is for riders to venture further afield into upland areas. There are many possible reasons for this, including riders becoming more skillful and therefore more confident, and improvements in bike technology, including e-bikes. This trend does bring some challenges, particularly as more remote paths are often more fragile. There is a need to raise awareness of this issue among the mountain biking community, promote a culture of responsible mountain biking, support landowners and voluntary groups to maintain the path networks, and work with upland path designers and builders to help them create paths – not specifically for bikes, but bearing in mind that bikes may well be used on them too.

Legislation in Scotland is among the very best in the world for giving people access to the countryside. It is crucial, of course, that people enjoy this access responsibly. Expressed more precisely, this means people acting in a way which is consistent with protecting the natural heritage resource, and compliant with The Nature Conservation (Scotland) Act 2004, the Land Reform (Scotland) Act 2003, and the Scottish Outdoor Access Code. All of the work to develop and maintain the trail network needs to be accompanied by messages about responsible use, management and environmental stewardship.

There have been fantastic developments in urban areas across Scotland, including numerous pump tracks and skills areas. We should continue to develop these facilities in towns and cities, on a localised needs-analysis basis. They will be a key component of increasing participation, particularly among groups that are less likely to take part at present.



Image by: Trev Worsey

THE IMPACT OF E-BIKES

A major new and growing trend in all forms of cycling is the e-bike. While this will open up mountain biking to people who would not have considered it before, it also has implications for the trail network. There will be a need to promote the existing trails that are most suitable for this type of biking. Any new trail construction should consider e-bike-friendly uphill 'flow' trails. And we will need additional promotion of responsible mountain biking on e-bikes, including reinforcement of the laws around pedal-assisted bikes and the implications for riders who modify bikes.

E-biking's impact on this strategy goes beyond the trail network. Participation will also be affected, including tourists, innovation, product development and suppliers.

Research is required across a wide range of areas to formulate a robust approach to maximise the opportunities and minimise any

negative impacts. Just some of the areas in which sound knowledge is required are: what motivates existing riders, new riders and tourists to use e-bikes, and where; the impact of such use on people's physical and mental wellbeing; the interaction between bike and trail surface; an understanding of any potential negative impacts on the environment, and any educational opportunities to mitigate these impacts; the innovation and development of the bike itself and its power unit. As ever, there will need to be collaboration between academia, suppliers and land managers and others.

Another growing segment of the mountain bike market is bike parks. Although more riders are looking for this experience, which involves uplift and wider flowing trails and expert jump lines, the facilities are currently lacking in Scotland. It is important that we develop a bike park in a key destination so that we benefit from the additional overnight stays and develop a world-class visitor offer.

Finally, it is important that any upgrading of the trail network is done with engagement from the mountain bike community and in connection with the tourism supply chain. This will ensure that planning is co-ordinated, the right trails are built in the right places, and maximum benefit is gained from any investment. DMBinS will play a key role in supporting this, particularly in key destinations.



Image by: Ross Bell



Image by: Trev Worsey



A world-class trail network



PREMIER DESTINATIONS

TWEED VALLEY

1. Glentress
2. Innerleithen DH
3. Enduro zones

FORT WILLIAM & LOCHABER

4. Nevis Range
5. World Cup DH
6. Kinlochleven
7. Glencoe

PRIORITY DESTINATIONS

DUMFRIES & GALLOWAY

8. Kirroughtree
9. Glentroot
10. Mable
11. Ae
12. Dumfries

PERTSHIRE

13. Comrie Croft
14. Dunkeld & Birnam
15. Pitlochry

CAIRNGORMS

16. Laggan Wolfrax
17. Glenlivet
18. Strathspey
19. Ballater

NORTH HIGHLANDS

20. Golspie
21. Torridon
22. Balblair
23. Learnie Red Rock

EMERGING DESTINATIONS

GLASGOW / LOCH LOMOND & TROSSACHS

24. Cathkin Braes
25. Aberfoyle
26. Dunoon

ABERDEENSHIRE

27. Tarland
28. Gravitate
29. Banchory
30. Aboyne
31. DH Farm (Portsoy)
32. Pitfichie

URBAN TRAILS

33. Pollok Park
34. Whitelee
35. Wishaw
36. SKELF
37. Beecraigs
38. Dundee
39. Alyth
40. Lochore Meadows
41. Inverness
42. Larbert High
43. Rankin Park (Greenock)
44. Bo'ness



OUTLYING TRAIL CENTRES

A Newcastleton

B Firetower Trails, Lochgilphead

C Moray Monster Trails

KEY

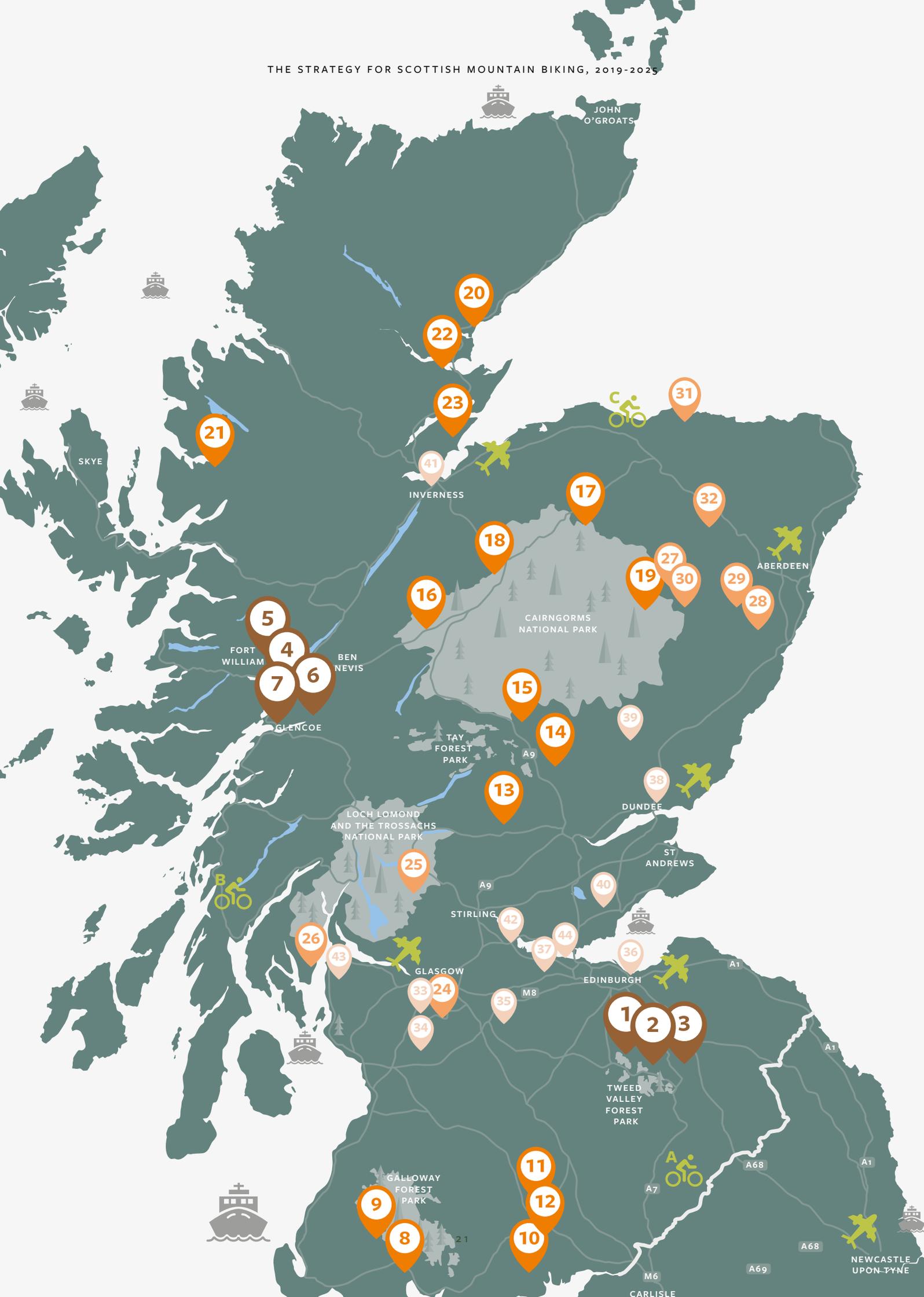
Airport

Port

Loch

National Park/Forest Parks

THE STRATEGY FOR SCOTTISH MOUNTAIN BIKING, 2019-2025





The international destination of choice

Scotland is an established and popular choice for visitors, for many reasons. Our world-renowned natural environment and our unique cultural and built heritage are two key factors that most other destinations simply cannot match. Scotland is also an attractive option for international business and investment, thanks to its well-established legislative and tax frameworks, skilled workforce, strong academic sector and well-developed infrastructure, among other factors.

Scotland has already done much to benefit from its natural advantages. The agencies which oversee our natural environment (such as Forestry and Land Scotland and Scottish Natural Heritage), and those that promote it (including VisitScotland), have enabled large numbers of both residents and visitors to enjoy the natural environment while supporting those who manage it.

The challenge is to build on these strengths to make Scotland the first-choice destination for all mountain bikers around the world.

To achieve this goal, choices must be made. The vision is for two premier destinations, one at either end of the country: Tweed Valley, and Fort William & Lochaber. These premier centres will act as a powerful draw, creating destinations as compelling for mountain bikers as Hawaii is for surfers or the Alps for skiers and snowboarders.

As part of this approach, the proposal is to build on the new trail developments that are currently underway at 7stanes Glentress, and create a combined Bike Park and Innovation Hub in the Tweed Valley. Given its strategic location close to Scotland's busiest airport (Edinburgh), we believe this will become the gateway to Scottish mountain biking, from which people will explore other destinations in Scotland. The Tweed Valley is envisaged as being a magnet for innovation and investment and also, as part of the wider Borderlands area, a world-class destination for cycle and adventure tourism. Working

with the emerging 'Tweed Valley Business Improvement District' there will be a need to support tourism businesses in the destination to fully embrace this status and develop a world class level of service to visitors, and other businesses to attract inward investment.

Fort William and Lochaber is already established as a mountain bike destination: for example, it has hosted the UCI DH World Cup since 2002. There is a need to continue to masterplan, then invest, in world-class infrastructure and a trail network which effectively links the key destinations of Nevis Range, Fort William centre, Kinlochleven and Glen Coe. Being equipped to host more international-level events will enable us to use them to promote a range of amazing trails, in a big mountain destination.

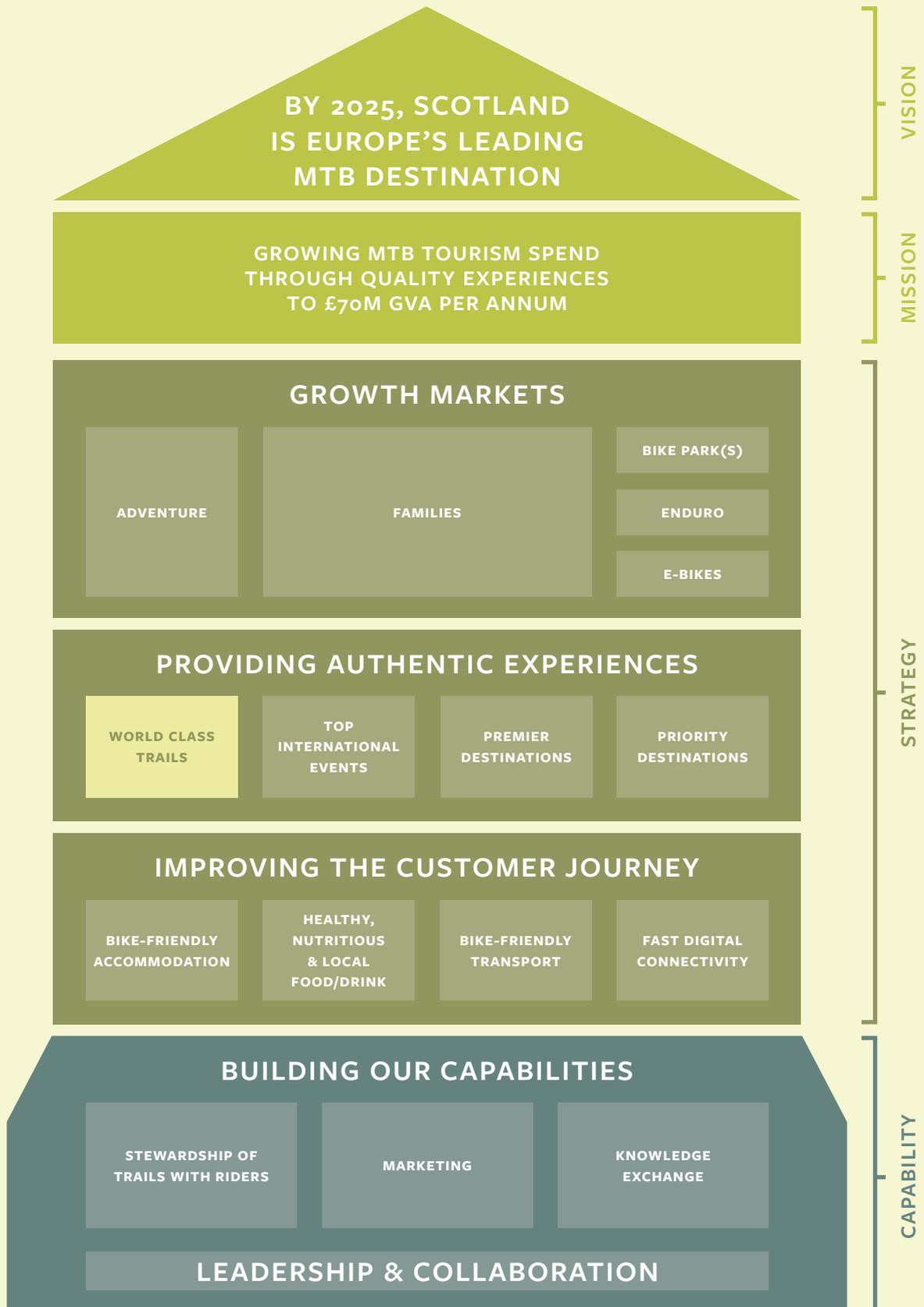
Again, there is the need to support businesses to provide a world-class level of service to the mountain bike visitor, particularly in the accommodation sector. Transport Scotland has already begun, by taking the forward-thinking step of introducing an additional train carriage for bikes from 2020 on the West Highland Line. For bike tourists, this strengthens the link between the premier destinations and central Scotland. The visitor journey will need to be further examined, tested and refined for this to be a success. This should then be rolled out to other key destinations.

The interest and activity generated by the two premier destinations will cascade down to four further priority destinations, resulting in extended stays: Dumfries & Galloway, Perthshire, Cairngorms, and the North of Scotland. And the potential is not limited to those areas. Two 'emerging destinations', Glasgow and Loch Lomond & Trossachs National Park and Aberdeenshire, have also been identified.

With this framework in place, the challenge is to build Scotland's profile generally, and awareness of the destinations specifically.

The partners in DMBinS will work with all those involved in promoting Scotland to enhance the country's image as a world-class destination for mountain biking. A key element of that process is to support high-quality international events, hosted at key destinations around the country.

OUR TOURISM ROCKET



Rocket diagram adapted from the Tourism Scotland 2020 framework scottishtourismalliance.co.uk/overview



A leader in MTB innovation

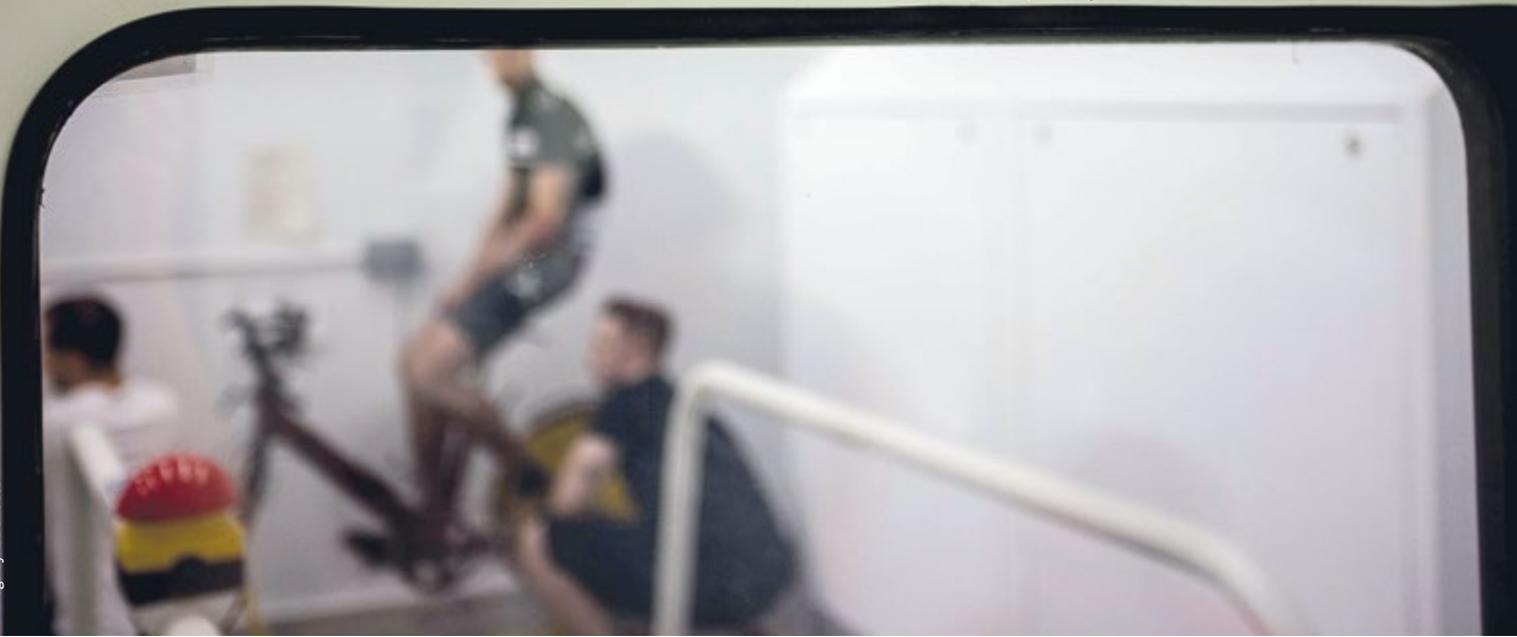


The economic benefits of mountain biking are certainly not limited to tourism and inward investment. Encouraging businesses to develop and promote new products and services for mountain bikers also contributes significantly to Scotland's economic growth. Scotland is a fantastic location for researching and developing new products. It has testing terrain and changeable weather conditions: if a product can withstand Scotland it will last anywhere in the world.

It is estimated that the global market for bike products will be worth \$65billion by 2025. The market for e-bikes alone could be worth \$25billion by that time.

Recognising this opportunity, in 2014 partners DMBinS, Edinburgh Napier University and Scottish Enterprise opened the Mountain Bike Centre of Scotland (MTBCOS). It is the world's first MTB innovation centre.





Currently based at Glentress, MTBCOS's key objective is to create economic benefits by encouraging academia and the mountain bike industry to communicate and collaborate. Through cutting-edge research from the academic sector, partnered with the support of economic development agencies, it has worked so far with over 250 Scottish businesses, in a wide range of sectors, creating innovative cycling products and services. It has helped them with market research, product development, knowledge sharing, testing, product launches and more. Aggregated annual turnover by these companies has increased by £13.5m, and products worth over £16m to the Scottish economy have been created.

Perhaps even more valuable, a community of open innovation now exists which involves public and private sector organisations, businesses and academia. This is fertile ground for future collaboration, innovation and business success.

It is time to build on MTBCOS's proven success. A key component of the proposal for a combined MTB hub in the Tweed Valley is the creation of an Innovation District, featuring the world's first Mountain Bike Innovation hub which will support the growth of existing Scottish SMEs and create new players in the market. It will be able to capture the attention of global brands, and bring their R&D and mobile investments to Scotland.

The facilities at this Hub will include a workshop, business incubator space, human performance lab and environmental testing chamber. This will facilitate future growth in many ways.

A clear and powerfully articulated offer by Scotland to inward investors is required, in order to attract further international investors and brands.

MTBCOS's work with Scottish businesses will continue. It will work to develop and launch more Scottish brands, and help them to succeed internationally.





Tackling Scotland's issues of health and wellbeing



Image by: Anna Henley

The link between physical activity, contact with the natural environment and improved mental and physical health is well established. As an easily accessible activity, mountain biking can clearly play a major role in making Scotland healthier.

One of the biggest issues within Scottish health is inequality. This can be addressed by broadening participation in mountain biking, which will therefore be the key focus of work in the participation action area of the strategy.

The gender inequality that exists not just in mountain biking but in most sports (and, indeed, in most countries) will be tackled, as will encouragement of participation by people from every ethnic and social background.

The strategy will build on the Scottish Cycling Women on 2Wheels programme, the Scottish Cycling bursary programme, the successes of the Adventure Syndicate, and will continue to work with the Scottish Cycling's Women's Development Group. It is vitally important that we continue to support and promote the need for more female mountain bike leaders at all levels within the sport. The growing network of Breeze champions who lead rides will be encouraged to lead mountain bike rides, if they wish to. It is also very important that work continues towards gender equality in marketing, promotion and imagery to help inspire more women and girls into the sport.



Image by: Eilish Wells



The development of trails within urban areas provides a great opportunity to diversify mountain biking for children and young people, particularly in areas that score highly on the Scottish Index of Multiple Deprivation.

However, the trails themselves will not enable access for everyone who would like to mountain bike. There is a need to provide facilities near these trails where there is access to well-maintained fleets of bikes, helmets, protective clothing and suitably trained leaders to help people enjoy the first taste of the trails in a safe and enjoyable manner. The pilot project in 2017 and 2018 in Dundee parks, involving Scottish Cycling, DMBinS, Dundee City Council, Edinburgh Napier University and Angus Cycle Hub, provides a model that could roll out to other areas.



Mountain biking can be part of current moves in Scotland to make more of the potential of natural assets to contribute to health outcomes – using the outdoors as Our Natural Health Service. There are opportunities to link with healthcare programmes and pathways and promote participation in local bike clubs, or in projects specifically designed to support people with mental or physical health issues. Such projects can inspire an interest in enjoying the natural environment, boost confidence by learning new skills and provide social contact.



Scots achieving on the world stage

For a small country, Scotland has already made a disproportionately large impact on world mountain biking, having produced numerous elite athletes in all the various disciplines.

In order to support the development of the rider pathway to an elite level, we need to increase the opportunities for everyone to participate, develop, compete and succeed in a safe, accessible and supportive environment.

Scottish Cycling has identified the steps required to deliver this outcome within their new strategy 'Developing a Nation of Cyclists'. The Strategy for Scottish Mountain Biking 2019-25 aligns with the new Scottish Cycling strategy to ensure that we work in partnership to deliver against our shared strategic aims.

Scottish Cycling identifies four strategic themes within their new strategy:

LEAD

Scottish Cycling is an efficient and inclusive organisation, leading the development of cycle sport in Scotland and influencing the national agenda by putting health and wellbeing at the heart of everything we do.

GROW

Grow the sport of cycling by increasing the opportunities for everyone to participate, develop, compete and succeed in a safe, accessible and supportive environment.



Image by: Ego Promotion



Image by: Keith Valentine



SUPPORT

Provide clubs, disciplines, volunteers and individual members with high-quality services, supporting the development of our cycling community.

PARTNER

Work in partnership with other organisations to identify shared outcomes and deliver our strategic objectives.

Two of Scottish Cycling's key priorities within the new strategy are to increase the number of female and youth participants in the sport. In addition, there is a shared understanding of a need to:

- Support the development and maintenance of purpose-built mountain bike facilities.
- Evidence and promote the wider physical and mental health benefits of the sport of mountain biking.
- Increase the number of people utilising trails and specifically urban trails by young people from SIMD areas.
- Increase access to mountain biking clubs by incentivising MTB leaders and coaches.
- Work to develop accessible race series at a variety of levels (local, regional and national) so that young riders have a clear pathway.
- Develop links between Scottish Cycling, British Cycling, colleges, universities, Scottish Institute of Sport and professional teams, so that together we can offer the best possible support to riders in all mountain bike disciplines.



Image by: Scottish Cycling

Image by: SMPix

TAKING ACTION

FACILITIES

EVENTS

PARTICIPATION

SPORT DEVELOPMENT

BUSINESS DEVELOPMENT

ATTRACTING VISITORS

In the Strategic Framework Refresh 2016-18, six action areas were set out. These have been useful in providing a clear context and structure to support the work of everyone involved in mountain biking.

Future action

The following action framework sets out a series of tasks that will deliver the strategy’s objectives, and address the priorities of the partners, the MTB industry, local riders and visitors. The tasks are grouped into the six action areas.

These tasks cannot be delivered by any one entity by itself. Delivery will have to be led by partnerships involving public agencies, the private sector, Local Authorities, Destination Management Organisations, NGOs and local communities.

Each of the actions has been given a rating to show its progress status. Green = complete, Orange = in progress, Brown = not yet begun.



FACILITIES

-  Bike park – Tweed Valley.

-  Trail centre/bike park – Aberdeenshire.

-  Masterplan – new trail development in key destinations (eg Highlands).

-  Refresh 7stanes trail network – South of Scotland.

-  Network of trail associations in key destinations and based on local demand.

-  Urban trail developments based on local demand.

-  Annual ‘Take Care of Your Trails’ campaign.

-  Promotion and development of trails which are suited for e-bikes.

-  Expansion of ‘natural’ trails mapped and promoted with adequate management and maintenance.

-  Promotion of National Access Forum (NAF) Unauthorised MTB trails guidance.

-  Network of bike patrols.

-  Europe-wide approach to address the lack of specific training to plan, design, build and maintain mountain biking trails.



EVENTS

-  Host the UCI World Championships for all cycling disciplines, including MTB, in Scotland.

-  UCI Downhill (DH) World Cup to be hosted every year in Fort William.

-  International level Enduro event to be hosted in Scotland annually.

-  Attract new international level events.

-  An inspiring cross country and DH event per year.

-  Promote and support the governance of national series’ SXC, SDA, Enduro and key endurance events (eg 10 Under the Ben, Relentless, Strathpuffer).

-  Each Cluster area to have an annual mountain biking festival.

-  Host international MTB conferences biennially from 2020.



Complete



In progress



Not yet begun



PARTICIPATION

-  Programmes developed around urban trails.

-  Targeted programmes aimed at increasing participation by women, young people and socially excluded groups.

-  Diversifying the marketing and imagery associated with mountain biking.

-  Mountain biking to be part of NHS Exercise referral programmes – particularly mental health programmes.

-  Mountain bike leader bursary programmes.

-  Promotion of entry-level mountain biking trails and guides to get you started.

-  Promotion of responsible mountain biking.

-  Research the opportunities and impacts of e-bikes.

SPORT DEVELOPMENT

-  Continue to develop the event pathway and coordinated calendar, particularly for children and young people to enter the sport.

-  Additional support for clubs to grow their membership, particularly clubs attracting children and young people.

-  Performance programmes in every mountain bike discipline.

-  Continue to grow the number of qualified coaches delivering in an MTB context.

-  Regional coaching camps (XC & DH) in each Scottish Cycling region.

-  Increase the number and quality of events which are part of a co-ordinated calendar.



Complete



In progress



Not yet begun



BUSINESS DEVELOPMENT, INWARD INVESTMENT AND INNOVATION

-  Create a world class centre for MTB innovation and service.

-  Excellence linked to Scottish universities, Mountain Bike Centre of Scotland (MTBCoS).

-  Encourage international companies to launch, test and develop bikes and bike accessories in Scotland.

-  Continue to support innovative product and service developments from idea to an international marketplace.

-  Continue to develop knowledge exchange between businesses and academia.

-  Refresh the existing Tourism Intelligence Scotland (TIS) guide for MTB tourism.

-  Deliver MTB workshops to the supply chain tourism businesses.

-  Refresh the Cyclists Welcome Scheme – particularly encouraging accommodation providers to deliver a world-class level of service to visitors.

-  Evolve the good practice guidance for tour operators, guides, coaches and skills instructors after its initial phase.

-  Secure greater industry leadership and commitment to developing the Scottish MTB sector.

-  Roll out an annual Scottish MTB Business Barometer Survey to monitor the growth prospects of key industry stakeholders.

-  Support businesses in key destinations to develop packages aimed at growth markets.



ATTRACTING VISITORS

-  Establish a MTB Scotland digital marketing strategy – highlighting Scotland’s key destinations, the adventure offer through our access legislation and our purpose built trail centre network and new bike parks.

-  Mountain biking content to be featured in relationship marketing, PR and social media as part of VisitScotland’s national and international marketing campaigns.

-  VisitScotland to promote the key destinations, trails and links to platforms to promote the best of mountain biking in Scotland.

-  Promotion of tour operators and guides to discover Scotland’s best singletrack.

-  Raise Scottish MTB profile at key events (Europe, UK and Scotland).

-  Enable easy searching for those who meet the new standards of the Cyclists’ Welcome Scheme to domestic and international audiences.

-  Support the private sector, in key destinations, to develop marketing and promotional opportunities, particularly around any new packaged experiences.

-  Scottish and international product development companies to launch new product ranges – which then promote Scotland as a leading international destination.

**THIS STRATEGY IS A LIVING DOCUMENT.
IT WILL BE USED TO REVIEW PROGRESS
AND THE STRATEGY ITSELF WILL
NEED TO BE REVIEWED AS A CLEARER
UNDERSTANDING OF THE INVESTMENT AND
MOUNTAIN BIKING LANDSCAPE CHANGES.**

Summary

Over the last nine years, mountain biking in Scotland has made great progress. It has been shown that a clear vision and an innovative approach can create partnerships that benefit all concerned, and deliver practical projects that help people across Scotland.

Huge opportunities remain, however, and mountain biking has much more to give to Scotland. We will only enjoy these benefits if we continue to work together in the effective partnerships that DMBinS has created and nurtured at every level.

That is why this document also sets out a vision for sustainably supporting the sector in the long term, developing a model that removes the need for long-term public sector investment.

With the right strategy and the right structure, the nation can bring together different sectors to promote innovation, investment and economic growth. We can open up opportunities for more people to try off-road cycling, thereby improving their health and reducing their impact on the environment. We can make Scotland an internationally renowned centre of excellence in mountain biking, both for competitive sport and in business, innovation and skills. We can ensure that more people responsibly enjoy Scotland's great outdoors, and that this natural asset is maintained and improved for future generations.

**IT IS AN
INSPIRING VISION,
AND TOGETHER WE
CAN DELIVER IT.**



Partnerships Across the Action Areas

The action areas can only be delivered through a range of partnerships. This maximises resources and delivers the best outcome for the people that matter: the riders!





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