

# REFRESH OF THE STRATEGY FOR SCOTTISH MOUNTAIN BIKING, 2023-2025 DRAFT FOR CONSULTATION



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## Introduction

### Welcome to the refresh of the Strategy for Scottish Mountain Biking, 2023-2025.

The partners of the Scottish Mountain Bike Consortium (the MTB Consortium) decided to conduct a refresh at the halfway point of the current 'Strategy for Scottish Mountain Biking, 2019-2025', to ensure that the strategy remains relevant, on course for delivery, and takes cognisance of the vastly different political, social, and economic landscape in 2022.

There has been significant progress in delivering the seven-year strategy. On behalf of the MTB Consortium, Developing Mountain Biking in Scotland (DMBinS) have provided a 'Progress Report' on the first four years of the strategy's implementation.

There have been many significant projects completed and many yet to be delivered, including 2023 UCI Cycling World Championships, strategic trail projects, and the MTB Innovation Centre.

This refresh will help provide strategic direction to the Scottish Government, cycling bodies, national agencies and organisations, tourism businesses, product designers and manufacturers, and the mountain bike community, to ensure that the proposed investments are maximised, new opportunities are explored and taken, and there is a clear direction and understanding of the impact of mountain biking in Scotland.

There is no doubt that the next few years will present the sector, and the mountain bike community, with many challenges to overcome, including the cost of living crisis, likely public spending restrictions, and our collective responsibility to reduce carbon emissions. As always, the best way to overcome these challenges will be for us to come together, discuss, agree (and disagree) and then deliver, and evidence our collective impact.

Members of the MTB Consortium are:

<ul style="list-style-type: none"><li>- Cycling Scotland</li><li>- Cycling UK (Scotland)</li><li>- Developing Mountain Biking in Scotland (DMBinS)</li><li>- Edinburgh Napier University/Mountain Bike Centre of Scotland</li></ul>	<ul style="list-style-type: none"><li>- EventScotland</li><li>- Forestry and Land Scotland</li><li>- Glenmore Lodge</li><li>- Highlands &amp; Islands Enterprise</li></ul>	<ul style="list-style-type: none"><li>- NatureScot</li><li>- Scottish Cycling</li><li>- Scottish Enterprise</li><li>- Scottish Government</li></ul>	<ul style="list-style-type: none"><li>- Scottish Land &amp; Estates</li><li>- South of Scotland Enterprise</li><li>- <b>sport</b>scotland</li><li>- VisitScotland</li></ul>
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**Vision (Reworded by members of the MTB Consortium May 22)**

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

**Mission (Internal analysis of these numbers is being conducted – the numbers provided below are estimates)**

Sustain 2.5 million annual visits to the Scottish outdoors on a mountain bike (Increase of 92% from 2015)

Multiple world champions or world series winners in every mountain bike discipline

Sustain mountain biking's annual total economic GVA contribution at £200m until 2025 (Overall increase of 100% from 2015 data)

## **National Co-ordination – 2023-2025**

Over the last 10 years, mountain biking in Scotland has made great progress. It has shown that an innovative approach and a clear vision can create partnerships that help all concerned.

Central to this approach has been the work of the Developing Mountain Biking in Scotland (DMBinS) team. Situated, and supported, within Scottish Cycling, DMBinS have led the process of developing the MTB strategy from 2019-2025 and have been responsible for delivering many of the actions within it.

They have brought together the partners of the MTB Consortium three times a year to ensure progress is being achieved, and developed relationships across multiple stakeholders to address any risks or challenges to delivering the strategy.

In 2019, Scottish Government provided funding for DMBinS for three years, as long as there was a move towards being self-funded at the end of the three year funding programme. The Scottish Government took a sympathetic view when this wasn't achieved, due to the work that DMBinS did during the Covid-19 pandemic to support the sector, providing advice to riders, facility providers, and businesses.

There was progress, though. DMBinS commissioned research by Edinburgh Napier University with the mountain bike community into how they would support a sustainable model going forward, and what this model could be. The answer showed clearly that the two areas mountain bikers most wanted to see from a national representative body were: health related programmes and trail developments.

Working with members of the Scottish Cycling board, DMBinS helped set up the Scottish Cycling Foundation (OSCR NO. SC051130) and launched two new funds: Scottish MTB Health Fund and the Scottish Trail Fund.

The biggest risk for the successful implementation of this strategy, and the ongoing success of mountain biking in Scotland, is that DMBinS loses core funding.

It should be in everyone's interest to work together to ensure that the core functions of DMBinS are sustainable and that they can support exciting and innovative health programmes, such as Trail Therapy, and can help grow and sustain the trail network across Scotland.

### **Evidence of Impact**

It is imperative that the impact of this strategy is understood and, to support the development of future strategies, that there is an accurate economic assessment of the impact of mountain biking in Scotland.

Members of the MTB Consortium should prioritise this action and collectively find the resource to develop this assessment.

To support this assessment, and to help understand participation trends, DMBinS should continue to develop a national trail counter programme with local, regional, and national dashboards.

## Key Theme - Trails – 2023-2025

### Introduction

*'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.'*

The opening paragraph of the 'Trails' theme in 'The Strategy for Scottish Mountain Biking, 2019-2025' still holds true. However, the sport has evolved over the last 3 years and whilst there has been significant progress, and opportunities captured, there remains a need to continue to invest in the trail network, for Scotland to reach its potential.

- **Strategic Trail Projects**
  - Tweed Valley – Bike Park & Enduro
  - Highlands Masterplans
  - Aberdeenshire integration with Adventure
  - 7stanes Refresh
  - Dunoon MTB Project
  - Perthshire Independent Bike Parks

These projects have been identified as having the biggest potential return on investment across the mission of this strategy.

Whilst it may be ambitious for all the projects to be delivered by 2025, it is important that the work continues to develop, and that negotiations with both private sector investors and funders are successful.

These projects would provide Scotland with modern mountain bike infrastructure which allows for sustainable economic growth, increased participation, and sports development.

It is vital that these projects, whilst maintaining their momentum, still engage with the mountain bike community and incorporate, where possible, the changing global landscape in mountain biking.

- **Multi-discipline venues**

Globally, at World Cup and World Championships level, the trend over the last few years has been towards multi-discipline venues and this looks to continue, if not increase, with the new direction outlined by UCI in their partnership with Warner Bros. Discovery, which joined forces with ESO Sports.

This strategy can foresee that the festival atmosphere and camaraderie that is created through this type of event will be popular with riders and sponsors.

Our strategic projects should take cognisance of this potential change. Taking into account the needs of the destination, the local MTB community, delivering a fantastic recreational opportunity, and the availability of the land and topography, a multi-discipline approach should be incorporated, where possible, within trail development infrastructure plans.

- **Cycling Facilities Fund**

The Cycling Facilities Fund is an £8m investment from Scottish Government, through **sportscotland** and Transport Scotland. It is on course to help leverage circa £20m of cycling facilities across all disciplines of cycling and will cover most Local Authority areas in Scotland. The CFF is also helping the delivery of elements of strategic projects, such as Tarland Trails, Aberdeenshire and Highland Bike Plans.

With around 40 pump tracks and 30 mountain bike skills areas either built, or being profiled for investment, the fund will help support grassroots mountain biking and create more clubs, local and regional races/events, and recreational cycling.

It is vital that the support offered by DMBinS, Scottish Cycling, and **sportscotland** continues and the projects can be delivered successfully.

- **Trails Associations**

The progress in riders setting up trails associations has been a real strength in Scottish mountain biking with 19 groups now working with landowners to maintain trails.

This strategy proposes that the next step and evolution of trails associations is for them to begin working with landowners/managers to not only adopt the management and maintenance of trails that were previously unauthorised builds, but to work together to plan and agree locations for new build trails.

It is likely that this approach will need some compromise. There may be some trails that will be kept in the long term however this is unlikely to mean a huge expansion in the trail network. It's more likely to be a considered refresh of trails, keeping the trail network updated, and complementing existing land management operations. For example, new trails should be planned for locations when existing trails may be lost to harvest operations.

With a mature and responsible approach from landowners/managers and Trails Associations it will be the intention to break the cycle of unauthorised trail construction whilst allowing the MTB community to build appropriate trails with permission.

Over the next few years, this strategy advocates for Trails Associations to continue to develop and, with the support of DMBinS and Scottish Cycling, investigate funding opportunities to recruit staff and deliver projects that meet the skills agenda and support employability, particularly in young people, whilst improving and developing the trail network.

- **DIRTT Project -> Skills Agenda**

The (Developing Intereuropean Resources for Trailbuilding Training) DIRTT Project has brought together partners from Scotland, DMBinS and Edinburgh Napier University, and across Europe to improve knowledge transfer within mountain biking trail building.

In Scotland, the content developed through the project has been used to develop a new 'DIRTT Volunteer Trail Dig Leader' course and is being used in an innovative project by DMBinS and Highland Council where they are supporting a young person back into education through mountain biking trail building. Two students from Scotland have also begun the EQF Level 5 college course at Fagskolen i Viken in Norway.

The European partners have been successful in securing the next step in the journey of European wide accreditation for trail builders as part of DIRTT 2.0, and the vision for an integrated network of educational institutions across Europe delivering trail courses.

Scotland should investigate all possible avenues to be part of the European partnership and should look to develop future courses at school, further and higher education, along with additional course(s) for volunteers following a needs analysis.

- **Retaining MTB Access Rights -> DMBinS on National Access Forum (NAF)**

There are still risks for mountain biking access in Scotland with debates on both Unauthorised Trails and e-bikes continuing at the National Access Forum. Scottish Cycling, though DMBinS staff, are now full members of the NAF and will help mitigate any risks and provide a voice for the MTB community to national partners.

- **Impact of Storms**

The storms of winter 2021/22 have had a devastating impact on the forests, the trails, and the communities who rely on the economic impact from both recreation and harvesting.

With climate change it is very likely that more of these events will occur in the future. It is vital that the response to the storm damage in 2021/22 is considered and, subsequently, plans developed between landowners/managers and communities to help mitigate the impact of future storm damage and ensure all resources are utilised in a safe and productive manner.

- **E-bike Research**

British Cycling contracted Edinburgh Napier University to undertake research titled 'The future directions and trends for off road e-MTB use and impact in Great Britain' with funding from Scotland sourced, with the help of DMBinS, from NatureScot and Scottish Forestry.

The research made several recommendations including:

- most e-MTB riders do not want to access fragile terrain, unauthorised trails, footpaths (in England),
- most e-MTB riders will ride further, faster, and ride more laps of the same trail. Landowners & managers believe they are seeing increased wear and tear as a direct result of e-MTB use
- knowledge of outdoor access codes and what to do in an emergency could be improved

A multi-agency response to the research should be developed and the main recommendations delivered.

The research didn't extend to the impact of e-bikes on upland paths. A pilot project should be developed to understand appropriate trail construction techniques that combine, and test, the robustness of a path to accommodate e-bikes, and regular bikes, and still maintain the authenticity of experience that riders want from upland/remote mountain paths.

- **Data and Evidence of Impact**

Working with Edinburgh Napier University, DMBinS are piloting a new innovative trail counter which will create a national, regional, and local dashboards to help collate data of trail usage across Scotland.

Evidencing the impact of trail projects should become a priority of this revised strategy and a greater understanding developed of the impact on health, communities, relationships with landowners/managers and other outdoor users, and sport development.

## **Destinations 2023-2025**

### **Introduction**

Mountain bike tourism was identified as the area most likely to have the greatest sustainable economic growth potential in the MTB sector. Achieving this requires destinations, and the businesses within them, to deliver a world class experience for visiting riders.

Much progress has been made, despite the challenges of Covid, and the UCI 2023 Cycling World Championships provide a fantastic opportunity for all destinations in Scotland. To take full advantage, not just in 2023 but beyond, destinations – and the agencies who support them - will need to continue to provide resources to businesses to get the basics right whilst developing memorable experiences at all visitor touch points.

#### **- Criteria for Premier, Priority & Emerging**

The 2019-2025 MTB Strategy provided a hierarchy of destinations across Scotland. This has helped provide a focus for securing regional level destination support, create clear communication of Scotland's best destinations, and helped secure trail infrastructure development.

To support all Scottish mountain bike destinations, this refresh proposes that using the knowledge of DMBinS staff working, visiting, and riding the destinations a framework/scorecard will be developed which captures what makes a successful destination. All destinations across Scotland should self-reflect and analyse where they currently view their offer and co-develop, with DMBinS, a scorecard of their current performance.

Whilst many destinations may feel they have plans in place, or being developed, which will change their overall score, this refresh hopes that the scorecard gives them both motivation to improve and strategic rationale for investment.

It should be noted that there is a risk of the criteria in the scorecard creating homogenous destinations where everyone strives to be the same without examining what makes their landscape, community, and/or place special. This strategy recommends that destinations examine their offer in terms of its uniqueness and how they can create market differential through their unique characteristics.

#### **- Major Events – Securing Events & Preparing Destinations**

From 2023, Warner. Bros Discovery have been awarded a contract by the UCI to deliver a new vision for mountain biking. The new vision will include Discovery Sport Events joining forces with the Enduro Sports Organisation (ESO Sports) to deliver the organisation, media production and broadcast, promotion, and commercialisation of the UCI Mountain Bike World Cup.

From 2024, Scottish presence in the international UCI calendar is unknown due to the new direction for global events which are looking for two or more disciplines to be combined.

Although UCI/ESO Sports have yet to release the bidding process, the indications are that the preference would be for multi-year deals for destinations allowing the sport to grow with security of international event status.

Depending on the criteria in the bidding process, it should be the intention that Scotland prepares a bid to continue to host international level UCI events in one of its premier destinations.

All the premier destinations in Scotland have elements which could/should be improved from trail infrastructure including multi-discipline, level and quality of year-round accommodation, transport links, and support to develop the scene and local businesses. The process of bidding should be used as a tool to inspire our destinations to improve their quality of offer, with subsequent investment, to enable Scotland to be showcased on the global stage.

To mitigate the possible risk to UCI events, EventScotland, British/Scottish Cycling, VisitScotland, and the economic development agencies must also consider event strategies for alternative/additional events.

- **Growth markets – E-bikes, Gravel/Adventure, Families, Enduro, Bike Park/Uplift**

The growth markets in mountain biking are still relevant from the previous strategy. These have only been strengthened as a result of the bike boom during covid.

The opportunities provided to Scotland through the Scottish Outdoor Access Code for responsible adventure, including using e-bikes, should be explored by destinations. This should not be taken lightly as the potential for user conflict and damage to fragile terrain is possible, even likely, however it also cannot be ignored by destinations as there will be growth in these markets. The key will be to mitigate the negatives though positive promotion, education, and management.

Families, enduro, and bike park/uplift market should all be considered through the trail plans for key destinations.

Destinations should develop and co-ordinate strong events calendars for all of the growth markets.

- **Improving the customer journey**
  - o **Bike friendly accommodation**

There have been improvements in key destinations, particularly where the DMBinS 'Secure Bike Storage Scheme' has been delivered.

There is a continual need for this type of scheme to be continued and extended into other key destinations. There should also be consideration given into how businesses who are excelling in this market can be lifted above other businesses, to ensure those who are providing a high level of service to mountain biking visitors can benefit from their investment.

The 'Scottish MTB Tourism' resource, including the business self-assessment tool should be further promoted and may be able to be used as a tool for businesses to self-certify, with occasional spot checks to ensure compliance, to demonstrate their excellence.

- o **Transport**

Steps have been taken to improve the bike friendly transport network across Scotland and initiatives such as the Bike Train to Oban and Borders Buses x62 bike friendly buses.

These initiatives should be extended into key destinations to allow for a more sustainable offer for both domestic and international mountain biking visitors.

- **Building our capabilities - Marketing**

The VisitScotland Destination & Sector Fund has seen particularly effective marketing of mountain biking and cycling, across key destinations. The DMBinS campaign alone had 6.6m impressions across all platforms.

2023 will see an increase in marketing profile and it is important that the mountain bike sector connects with the '2023 Cycling World Championships' brand and develops a symbiotic relationship between the event and the industry, for everyone to benefit from the increased profile.

It is also important that a legacy brand, or marketing strategy, is developed post-2023. Global eyes will remain on Scotland, and it is important that we can continue to inspire more visits to Scotland to mountain bike and cycle.

## **Innovation 2023-2025**

### **- Progress innovation centre**

The proposed Mountain Bike Innovation Centre in Innerleithen, Tweed Valley will be the biggest step change for the bike industry in Scotland for years.

The ability to rapid prototype, test equipment both in a lab and trail setting, combine Scottish companies into a hotbed of global brands, and offer/be a place where academia meets industry, provides the sector with a fantastic opportunity.

This will help business innovation and sustainable growth, not only for local Borders-based businesses but also for existing Scottish based innovators and the global mountain bike industry.

In combination with the bike park, this innovative approach will help secure Scotland's global reputation and ensure both our tourism and industry/business support offer continues beyond the years of this strategic refresh.

The project is being led by South of Scotland Enterprise in partnership with Edinburgh Napier University.

### **- Creating a UK & European Wide Network**

Edinburgh Napier University is one of the founding members of Cycling Industries Europe (CIE). CIE is the voice of cycling business, actively promoting the sector in Europe and worldwide – it is important that ENU continue to be connected to the global cycling industry, creating connections that benefit the cycling industry in Scotland.

The MTB Innovation Centre will be part of an EU wide network of innovation support. This network provides many opportunities for Scottish-based businesses and academia. As an industry that will be largely protected from changes within the macro and political landscape, it is important that the support is available for both academia and businesses to engage at European level.

The UK bike industry is also at an exciting phase, with the Bicycle Association of Great Britain developing plans for 'Bike Innovation Clusters' across the UK. Scotland should place itself as the main location for this industry development and be viewed as the best location in the UK for industry development, through a structured programme of support, with academia and our enterprise agencies working in collaboration.

### **- Reshoring & Remanufacturing**

Scotland has long been an innovator in the bicycling industry, including the first pedal driven bicycle (Kirkpatrick Macmillan) and the first pneumatic tyre (Dunlop). With the movement of the cycling industry towards reshoring manufacturing from the Far East into Europe and the need for a circular economy to help mitigate the environmental crisis, there will be opportunities for Scotland's industry to grow. It is important that our enterprise agencies work with academia and industry to realise these opportunities.

## **Key Theme - Health 2023-2025**

### **Introduction**

Bike sales reached unprecedented levels during the Covid-19 pandemic. Mountain bikes were the bestselling type of bike, according to statistics from the Bicycle Association of Great Britain, with over 40% of sales for off-road use.

This provides Scotland with a real opportunity, combined with the profile of hosting the UCI Cycling World Championships in 2023, to sustainably grow levels of participation in mountain biking.

#### **- Gender**

There are strong indications that there are more women and girls cycling, and mountain biking, than ever before. However, there remains an inequality in participation and the potential remains to use mountain biking to increase levels of activity amongst women and girls.

This refresh recommends that we continue progress the direction set in the 'Strategy for Scottish Mountain Biking, 2019-2025'. It is vital we continue to create female role models at all levels using, and developing, programmes such as the successful Rider2Leader initiative from DMBinS; both the public and private sector should have females and girls within their marketing and promotion; and inspiring leaders, from business and within the female mountain bike community, should be encouraged, and supported, to develop events that create a sense of camaraderie and community which help engage more women in the sport.

#### **- Trail Therapy**

Trail Therapy has been an incredibly successful programme, delivered by DMBinS, in Dundee, Perth & Kinross, South Lanarkshire, and Scottish Borders.

The programme should continue to investigate funding opportunities to spread its benefits across Scotland and continue to work with all age groups, family groups, community-led initiatives, along with NHS professionals, to ensure that people with varying degrees of mental ill-health have access to the programme. The programme should continue to mentor and train volunteers and mental health professionals to help its long term sustainability and grow its impact.

We should pilot ways in which e-bikes can break down participation barriers and monitor their impact.

#### **- Children & Young People**

There remains a need to continue to encourage more children and young people into cycling and mountain biking. The 'Free Bikes for Kids' initiative provides an ideal opportunity to engage many children and young people in the sport, who would not otherwise be able to access it, due to financial constraints. The pilots run at mountain bike trails and pump tracks, including Scottish Cycling's Rock Up & Ride pilot, have proven to be very successful, with large numbers of children and young people participating and local clubs being involved in the delivery. This should be built upon and developed to create systems such as bike libraries where, as the bikes become too small for riders, they can be recycled to new riders.

Outdoor centres also provide many children and young people with their first experience of outdoor or adventure activities. It is vital that these important facilities remain open, and links are created between these experiences and facilities that are available at children and young people's local area.

#### **- SIMD Areas - Urban trails**

As the number of pump tracks and MTB skills areas continues to grow in urban areas of Scotland (see Trails), it is vital that we connect these facilities with programmes that allow those who would like to ride but have barriers to access them. This may include free bikes, coaching/activation taking place, and mentors at tracks, to ensure a helpful and positive environment is created at the facilities.

Multiple stakeholders should come together to co-develop programmes with existing users to provide skills training, build confidence, particularly with young people to help them get formal coaching and leadership qualifications, and event delivery experience to create local scenes around these facilities.

- **Disability & Ethnic Minority Tutor Pilot**

By providing realistic and relatable role models from within underrepresented communities, we increase the likelihood of inclusivity, and we also benefit enormously from engaging with a richer and more diverse workforce.

This strategy proposes that the work by DMBinS, to generate a pool of relatable and accessible leader and tutor role models from within the disabled and ethnic minority communities continues and any impact evidenced.

Currently in Scotland we have no qualified disabled mountain bike tutors or tutors from an ethnic minority. With so many other barriers that can impede access to mountain biking, the lack of visible role models is felt keenly.

The concept of 'seeing is believing' is extremely powerful and many studies across many sectors demonstrate that exposure to someone you relate to greatly improves your perception of 'it's for me'.

We are in a unique position to truly impact on the accessibility of mountain biking for the disabled and ethnic minority communities. But not only that, with a disabled and/or ethnic minority tutor and leaders we increase acceptance, not only within the disabled/ethnic minority communities, but within the rest of the mountain bike community too.

## **Key Theme - Sport 2023-2025**

### **Introduction**

Scottish Cycling are the lead partner in creating and implementing a strategy to grow and develop the sport of cycling, including mountain biking.

They are also evolving their current strategy and are welcoming consultations from late October.

### **How Scottish Cycling Will Deliver**

Scottish Cycling have broken their strategy down into eight priority areas which together will help fulfil their ambitious but achievable new strategy. Whilst split into eight areas, it is clear there is plenty of overlap, with most areas reliant on at least one other area to be truly successful.

*“As an organisation, and community, we must all work together to fulfil our potential.”*

The eight priority areas are as follow:

1. Clubs – The heart of our community
2. Growing Participation - Cycling has the power to change lives, and is a sport for everyone
3. Events - Everyone has the opportunity to experience the thrill of racing and achieve their best
4. Places to Ride - A purpose-built, safe space to ride, no matter what bike you choose
5. People - Develop the inspirational people who make our sport happen
6. Performance Development Pathway - Provide riders who have the capability of competing on the world stage with the platform to fulfil their potential
7. Influence - Play a proactive role in ensuring cycle sport is at the heart of national cycling policy, making cycling a sport for life
8. Governance & Business Operations - Ensure best practice in all we do

The full strategy is currently available for consultation on the Scottish Cycling website and is welcoming responses.

This draft for consultation of this 'Refresh of the Strategy for Scottish Mountain Biking, 2023-2025' has been developed by Developing Mountain Biking in Scotland (DMBinS) with the support and help of all the members of the Scottish Mountain Bike (MTB) Consortium.

The members of the MTB Consortium are:

		
		
		
		
		
		