

Annex 1

Scottish Borders Cycle Tourism Strategy 2016-2021

'Keeping up the momentum'

October 2016

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1. Purpose of Document

The purpose of this document is to set out a proposed five year strategy for cycle tourism in the Scottish Borders until 2021. It details the product strengths, the challenges and the ambitions of using cycling as a means to deliver economic benefit to the area. It also highlights key issues needing to be addressed and identifies three key objectives. This document is a result of a consultation exercise ensuring that all relevant partners and interested groups and individuals have been engaged with prior to progressing the subsequent Action Plan.

2. Introduction

The Scottish Borders has a long-established and substantial road cycling offer along with world-class mountain biking at the 7stanes sites at Glentress, Innerleithen, Newcastleton, and also a series of natural trails. The natural assets of the Scottish Borders provide a wonderful cycling¹ playground that is supported by a range of cycle friendly services. Unlike other activities, cycling is available throughout the Borders offering good opportunity for geographic spread.

Following the development of the 7stanes and a concerted effort to promote road cycling from 2009 via the Scottish Borders Recreational Cycling Group (SBRCG), cycling has become a key tourism product for the area. The SBRCG comprised a number of organisations and interests with either a remit for, or an interest in, the promotion of cycling. This period of activity coincided with a growth in the number of cycling and mountain biking events with TweedLove, the Tour de Lauder, the Tour o' the Borders and the Enduro World Series exploding on to the scene helping to promote the area and firmly putting it on the 'map'.

Activity to date has mostly relied on funding from sources such as LEADER, or as support activity around the regular hosting of the Tour of Britain, resulting in infrequent bursts of activity and momentum. Some of this funding supported a Project Manager working a few days each month delivering planned activity. As part of the LEADER-funded projects by the SBRCG a website was developed under the heading of Cycle Scottish Borders. On the completion of the second LEADER project in 2013 the final report concluded that going forward both road cycling and mountain biking should be promoted together, i.e. in an 'all wheels' project. Due to a lack of funding this idea has not been progressed.

There is now a need to consider activity to date whilst looking at the bigger opportunity and to develop an Action Plan using cycle tourism as a means to increase economic benefit to the Scottish Borders.

¹ For the purposes of this document 'cycling' refers to both mountain biking and road cycling.

3. The Vision

The following vision is proposed:

We will work to make the Scottish Borders one of Britain's premier destinations for cycling by 2021.

3.1 Strategic Aim

Scottish Borders Council will seek to deliver this vision by developing the cycle tourism product, including cycling events, by working across the public, private and voluntary sectors. The aim is:

To develop prioritised aspects of cycle tourism by capitalising on the Scottish Borders' unique selling points to increase awareness and, through the creation of packages, deliver strong economic impact.

3.2 Objectives

The overall aim is to develop the reputation of the Scottish Borders to maximise wider tourism benefits, working in partnership and leveraging the Borders Railway as opportunities arise. The following key objectives are desirable:

- Develop our cycle tourism assets – turn our assets into experiences and packages, and improve quality
- Event development – attract new, develop existing and leverage events to maximise wider tourism opportunities
- Build consumer demand – promote quality authentic experiences to target markets

The lack of baseline data on the product and market currently restricts the opportunity to make these objectives – more specific or measurable. This is an issue needing to be addressed as the Action Plan is developed.

4. Value of Cycle Tourism

Cycle tourism has an important role to play in supporting local, sustainable economic development. Cycling is a thriving sector of Scotland's tourism industry. VisitScotland's research shows that in the first nine months of 2015 alone, GB residents who took part in cycling and mountain biking during overnight or day trips to Scotland spent almost £155 million. Analysis from Sustrans shows that spending from cycle tourism and leisure cycling across Scotland reached a record £375 million in 2014.

There is great potential to increase the impact and benefits for the whole country and for the Scottish Borders, which offers some of Scotland's most exceptional landscapes and outstanding routes and trails for the activity.

4.1 Target Markets

Little or no data exists specifically for the Scottish Borders, and this has been identified as a key issue going forward. Small pockets of data exist from a range of stakeholders but not enough to provide a complete picture. There is no indication of who the target markets are who will be attracted to the region's cycling assets or the value of them, eg main purpose cyclists, generalists who cycle as part of a holiday, day trippers or those staying overnight. Without this information the scale of opportunity cannot be quantified and without baseline data or segmentation it is difficult to identify targets or to measure what success may look like.

5. Strategic Considerations

There are a range of initiatives, strategies and stakeholders involved in cycle tourism both within the Scottish Borders region but also nationwide. The following section details some of the key strategic considerations.

Ambitious for the Borders sets out that the Scottish Borders Council (SBC) administration will ensure that economic development is the key driver by:

- Supporting our communities through a focused programme of regeneration and rural development with an emphasis on working with the Scottish Government
- Strengthening our targeted marketing strategy to attract business into the Scottish Borders and building on the opportunities provided by the Borders Railway

Furthermore the ***Scottish Borders Economic Strategy 2023*** has four key strategic aims:

- Creating the conditions for business to compete
- Building on our assets
- Developing the workforce of the future
- Providing Leadership

In addition the Council's ***Corporate Plan*** has eight priorities, which relate to both external and internal facing services. The two that are most relevant to this Strategy are:

- Encouraging sustainable economic growth
- Developing our assets and resources

Furthermore, consideration must be given to the need to

- Maximising the Place – town centres, activity tourism and location
- Focusing on our competitive advantage and also our natural assets
- Encouraging entrepreneurial activity.
- Opportunities for economic diversification and further development of the rural economy.

5.1 Local Access and Transport Strategy

This consultation document contains a section on cycling and walking and suggests a long term future cycling network, primarily utilising the existing former rail network. Specifically it acknowledges that cycling and walking are fundamental elements of any integrated transport system offering a wide range of benefits including cheap flexible transport, increased health benefits and pollution-free travel.

A number of issues are raised in this document including a potential pilot project to develop and promote 'Sections of Quiet Road'. This 'sections of quieter road' at a selected location would be specifically linked to the development of a strategic shared access network for the Scottish Borders. Linked to this would be the potential safeguarding the 125 mile network of former railway lines, which have the potential to be used as safer walking, cycling and horse riding routes. Such an initiative would deliver economic and tourism related benefits for the area.

5.2 Cycling Action Plan for Scotland

This document by Cycling Scotland contains 19 actions, and outlines how through working in partnership the shared vision that by 2020, 10% of everyday journeys taken in Scotland will be by bike, will be achieved.

These actions include Borders specific approaches to supporting functional cycling, the promotion and support of community-led cycling initiatives and the development of the National Cycling Network.

5.3 Transform Scotland

In 2013, Transform Scotland published a report on the Value of Cycle Tourism. This report made a number of key recommendations in the following areas which should be considered alongside this strategy and action plan:

- Strengthening Leadership and Collaboration
- Knowing our Markets
- Managing the Customer Journey
- Building Sustainable Tourism

5.4 Abellio ScotRail Cycle Innovation Plan

This details Abellio ScotRail's vision and approach to sustainable transport. Specifically it details plans to include a Bike & Go service at Tweedbank, their intention to support feature cycle events and also develop a leisure programme for popular cycle destinations such as the Scottish Borders. Furthermore cycle events will be a mandatory item on the agenda of the ScotRail Cycle Forum.

5.5 Borders Community Rail Partnership

Community Rail Partnerships form a bridge between the railway and local communities, bringing together a wide range of interests along a rail corridor. The Partnership works to build connections between those managing the railway and the communities along the length of the line from Edinburgh to Tweedbank, maximising the potential and benefits of the line for all.

5.6 The South East Scotland Strategic Development Plan Authority

SESplan is a partnership of six Member Authorities comprising the City of Edinburgh, East Lothian, Midlothian, Fife, Scottish Borders and West Lothian, working together on strategic development planning matters. SESplan's key role is to prepare and maintain an up to date Strategic Development Plan (SDP) for the South East Scotland area. This process involves engaging key stakeholders and the wider community. The first SDP was approved by Scottish Ministers in June 2013.

5.7 South East of Scotland Transport Partnership

SEStran has been working toward the development of key strategic regional cycle routes, which have been identified within their Strategic Cross Boundary Cycle Development plan. As part of its delivery SEStran work closely with Sustrans to offer the SEStran Regional Cycle Network Grant Scheme.

5.8 Green Networks

Scottish Natural Heritage encourages green networks. Such network have multiple objectives, often with a primary aim of improving the environment for people, and usually to help to improve the economic status of an area, by making it more attractive place to live and work. Scottish Borders Council supports the development of Green Networks where relevant.

5.9 The Tourism Development Framework

Published by VisitScotland with input from many parties, including the Council, the Tourism Development Framework for Scotland looks at the role of the planning system in delivering the visitor economy. It contains a specific section on road cycling and mountain biking and reference is made to the Glentworth Masterplan. This document also contains development priorities for the Scottish Borders across a number of areas including transport, accommodation and activities with specific reference included on mountain biking and the railway.

5.10 The National Tourism Strategy

The National Strategy: *Tourism Scotland 2020* was developed to target markets offering the greatest growth potential, focusing on developing key assets through collaboration in order to offer visitors a diverse range of authentic experiences. The Strategy states 'playing' to Scotland's strengths is one half of the step change required. In order to develop quality and authentic tourism experiences we must also build the capability of our businesses and the industry as a whole in the following key areas:

- Leadership and collaboration
- Sustainable tourism
- Quality and skills
- Marketing

This cycle tourism strategy links directly to the National Strategy's Nature and Activities priority.

5.11 Regional Tourism Context

The Scottish Borders Area Tourism Partnership's vision up until 2020 is to grow tourism visits and spend in the Scottish Borders, through positioning and promotion as, a sustainable, year-round destination, which capitalises on its unique geography, heritage, natural environment and people. Cycling features as a key action within the Partnership's plan.

5.12 Event Strategies

With the increase in cycling events in the area it is worth noting that Scotland's Events Strategy states the need:

- to utilise and develop the assets that Scotland has which make it The Perfect Stage for events
- to deliver a portfolio of events which provide world leading authentic experiences for residents and visitors

Scottish Borders Council's Events Plan 2014-2020 has the following objectives:

- To support the development of events
- To encourage effective event promotion and marketing
- To ensure events are evaluated so we understand their economic impact

6. Competitive Positioning

In a previous LEADER-funded project for road cycling, the Scottish Borders was positioned as 'Scotland's leading cycling destination'. It should be noted that although mountain biking was not explicitly promoted as part of this project the world class status of 7stanes was implied, or 'borrowed', to help reinforce this positioning.

Furthermore, as a result of a pilot project to expand VisitScotland's Cyclists Welcome Scheme, the Scottish Borders is well served with scheme members and this adds weight to the area being the most friendly cycling destination in Scotland.

The growth in the number of cycling events continues to help raise the profile and provide plenty of content for social media. In short, the area has a wealth of cycle tourism assets, albeit there are superior trails, events, road surfaces and infrastructure to be found elsewhere.

Although very little specific marketing activity currently takes place, the 'leading' positioning continues to be used as and when the opportunity arises e.g. during the promotion of the Tour of Britain to promote Cycle Scottish Borders, and where relevant in VisitScotland's regional marketing activity.

It should be noted that at the time the 'leading destination' positioning was created few areas in Scotland were using cycling as a key product message and as a result the Scottish Borders was often cited as best practice in cycle tourism. These days there are other Local Authorities who are keen to do more to promote the cycling in their areas, however only a few have the mix of mountain biking and road cycling – e.g. Perthshire, Dumfries & Galloway and the Highlands. Fife has previously undertaken significant activity to promote their cycle routes and more recently Edinburgh and the Lothian's Area Tourism Partnership has explored the possibility of working collaboratively to promote cycling across the wider region. Midlothian has subsequently taken a further step by hosting a stand-alone workshop to develop their cycle tourism offer and have now published a factsheet on cycle-friendly businesses. They are also keen to maximise cycling and walking opportunities associated with the Borders Railway. Glasgow, South Lanarkshire and Dundee also have broad cycling strategies that are not tourism specific.

Beyond Scotland, areas such as Yorkshire, the Lake District, the Peak District and Devon & Cornwall all have good cycling product and some have very good mountain biking. The hosting of the Grand Depart of the Tour de France in Yorkshire, and the high profile Tour de Yorkshire have done much to position Yorkshire as a key cycling destination in the UK. These areas (and many others) also host stages of the Tour of Britain which shine a media spotlight and help add credibility to a destination. In a world of limited resources, events need to be used to help promote destinations and make every pound go further.

Wales also has a good offering of both cycling and mountain biking (Bike Park Wales) and a range of cycling events such as the Velothon Wales with 18,000 riders taking part in this closed road sportive, and the Dragon Ride with four distances including the Dragon Devil offering a 305km route for more experienced riders. It is an increasingly competitive market from a domestic tourism perspective and without having a presence in the market place, the Scottish Borders will be difficult to find and the potential to increase economic benefit will be greatly reduced.

Overseas competitors are many and varied and include Majorca, Italy, numerous alpine/mountain destinations in Europe such as Les Gets in France, and also further afield e.g. the USA, Canada (Whistler) or New Zealand (Queenstown).

7. Scottish Borders Product Strengths

7.1 Road Cycling

There are hundreds of miles of cycling routes on mainly quiet roads across the Borders, including a good range of long distance routes. Please refer to the map in the Appendix.

- The Borderloop is 250 miles long and provides a reasonably comprehensive tour of the area
- The 4 Abbeys is 55 miles long and links the Borders' key abbeys
- The Tweed Cycle Route follows the course of the Tweed along a 95 mile route
- The Coast & Castles route/National Cycle Network (NCN) route 1 passes through the area from Newcastle to Edinburgh, and NCN Route 76 between Berwick upon Tweed and Edinburgh passes through coastal Berwickshire and forms an integral part of the North Sea Cycle Route.
- The Southern Borders Loop, a fairly recent addition to the long distance routes, links Hawick and Newcastleton over two distance choices; as yet not specifically signposted.

The area is also well served by an excellent range of shorter local cycling trails from:

Duns – 5 trails at 4.5, 10, 16, 16.5 and 25.5 mile distances

Eyemouth – 4 trails at 8.5, 14, 20 and 26 mile distances

Hawick – 4 trails at 7, 14, 14.5 and 19 mile distances

Innerleithen – 3 trails at 37, 42 and 53 mile distances, including the local favourite Megget & Talla

Jedburgh – 5 trails at 7, 11.5, 17.5, 19 and 20 mile distances

Kelso – 5 trails at 5.5, 14, 18.5, 20.5 and 24 mile distances

Melrose – 4 trails at 5, 8, 13.5 and 15.5 mile distances

Peebles – 5 trails at 7.5, 13, 20.5, 22.5 and 26 mile distances

Selkirk – 4 trails at 7, 8.5, 16 and 19.5 mile distances

The long distance routes are more suitable for confident, main purpose cyclists, whilst some of the trails from the towns provide plenty of cycling opportunities over a variety of distances.

In reality these routes are under-promoted. Locals are often unaware of most of these routes, never mind those the region is hoping to attract.

Safety of both local and visiting cyclists is important and the majority of these routes have been developed utilising the network of quiet roads in the region. They are not car free zones however and safety of cyclists remains a key issue. Several routes involve cycling on or crossing busy roads such as the A1 or A68. In particular, some cyclists from overseas may have a different expectation when it comes to quiet roads and the quality of some of the road surfaces.

The Council has recently developed an off-road route on the former railway line between Peebles and Innerleithen which has proven to be very popular with over 70,000 people using the path on an annual basis. Subsequently, a number of communities throughout the Scottish Borders have indicated a desire to see a strategic network of routes that would help to connect local towns and villages together.

Bike hire is available in a number of locations throughout the Borders, but predominantly in the Tweed Valley and also in Newcastleton. There is also limited bike hire available in neighbouring Berwick upon Tweed. Until recently electric bike hire was available in the Tweed Valley, but

unfortunately this business has ceased trading. Electric bike hire has the potential to open up other markets.

7.2 Mountain Biking

The Scottish Borders can boast world-class mountain biking with the 7stanes at Glentress, Innerleithen and Newcastleton; these trails are a huge year-round tourism asset. To some, however, these trails are no longer world leading and due to a lack of investment in maintenance and development are no longer considered the best out there; the Tweed Valley is being left behind. Unofficial trails are developed under the cover of darkness in an attempt to fill this gap. These illegal, wild trails do not have any big jumps or large drops and there are issues regarding the ongoing maintenance and safety of those using them. By in large the 7stanes trails have not developed at the same pace as the market demands and without development there is the potential for a drop off in numbers.

The mountain biking options at 7stanes are varied and are suited to both beginners and those who are more experienced either in cross country or downhill. The 7stanes trails are graded so users can identify the trail most suited to their ability and this provides the opportunity to either progress as their skills develop, or to participate as a family. One of the many benefits of mountain biking is that it can be an all year round activity – tricky conditions with mud and leaves can add to the experience. There are a number of operators based in the Tweed Valley offering guiding and skills coaching for mountain biking.

Further details on developments in the Tweed Valley can be found in section 8.1.

Further mountain biking trails are to be found around Jedburgh, promoted locally as Jedforest Trails and comprise a unique mixture of waymarked mountain bike routes. They consist of an eclectic mix of natural and man-made surfaced trails linked by forest track and some tarmac roads. This includes the 40km Justice Trail and also three family routes.

The Duke of Roxburghe has recently provided consent for Kelso Wheelers to lease Angraflats plantation on the outskirts of Kelso for an off-road cycling area, which would provide improved local training facilities and encourage more people to take up the sport.

7.3 Welcoming Cyclists

There is very good provision of services for cycle visitors with approximately 100 businesses in VisitScotland's Cyclists Welcome Scheme. Membership of this scheme provides these businesses with the opportunity to be listed on the Cycle Scottish Borders website for free. The Tweed Valley Tourism Consortium also promotes a Mountain Bike Hospitality Scheme for those businesses who specifically cater for the needs of mountain bikers to the area.

7.4 A Developing Events Calendar

The Scottish Borders has a very good range of cycling events to both participate in and to spectate at. Events such as TweedLove, the Tour o' the Borders, Tour de Lauder and the Enduro World Series have all helped to raise awareness of what the area has to offer. Ride to the Sun travels through the Borders from Carlisle to Cramond in Edinburgh and makes use of the facilities at the Crook Inn, helping to put the area on the cycling map.

The frequent hosting of the Tour of Britain brings a significant media spotlight with it and the traffic to the Cycle Scottish Borders site significantly increases when the event is in town, albeit from a low base, eg from 550 visits per week to almost 2,000. The Tour of Britain relies on funding from

Scottish Borders Council and EventScotland who also support other cycling events in the region eg TweedLove and Tour o' the Borders. Events supported by EventScotland feature as part of the national portfolio.

New events continue to appear and be explored with 2016/17 looking as if it is going to have at least three new significant cycle events in the calendar (Race the Train, The Gran Fonduro and PoppyScotland and Shelter Scotland charity cycle rides). The growth in the number of new events may have an impact on existing club events that have been experiencing a drop in participants eg the Ken Laidlaw Sportive run by Hawick Cycling Club was cancelled this year due to a lack of participants.

In recent times the Tweed Valley has benefited from the growth in endurance events, hosting the Enduro Worlds Series twice. The market is predominantly private sector led and attracts a wide audience from both the UK and Internationally. The events are characterised by participants paying an entry fee which helps to offset the costs of the overall event. This as a new growth area which needs to be capitalised on and the Scottish Borders is a perfect location.

7.5 Railways

Berwick upon Tweed provides an opportunity for visitors to alight and access the Borders through Berwickshire. The potential re-opening of the station at Reston will, if realised, provide a further access point.

The re-introduction of the Borders Railway provides an opportunity for more visitors to access the area with the Edinburgh catchment area alone representing a significant market. There is room for two bikes per train, if space allows more cyclists will be accommodated on each journey at the discretion of the staff. Anecdotally, travellers with bikes appear to be accommodated but the uncertainty around being able to travel with bikes will put some visitors off, especially those travelling as a family, or as a group. There is no significant increase planned for current on-train provision.

As yet there is no bike hire available at any of the Borders' stations, but there is the potential for a Bike & Go facility operated in partnership with ScotRail at Tweedbank. The nearest bike hire is available in Galashiels and also in Melrose.

The railway provides an opportunity for spectators to travel and attend cycling events in the area, e.g. The Tour of Britain. Abellio ScotRail's Cycling Innovation Plan states that they will support/feature key cycle events in Scotland. Although early stages this has yet to manifest itself into anything meaningful.

There is good provision of cycle racks at the new stations and also throughout the area's towns.

Opportunities exist to work in partnership with Midlothian to promote the cycling (and walking) routes from the stations along the Borders Railway.

8. Scottish Borders Product Challenges

A number of issues and actions were identified in the Tourism Destination Audit undertaken in 2015 as part of the activity surrounding the re-introduction of the Borders Railway. This included the need for the development of:

- additional hostel/bunkhouse style accommodation (favoured by those undertaking outdoor activities)
- bike hire at stations
- bike hire/drop off at attractions
- small group bike tours from stations
- extended opening hours of attractions
- extended opening hours for bike hire into the evening during summertime

Other issues that have been identified as part of the consultation on the draft Strategy include:

- sufficient geographic spread of cycle friendly businesses to encourage wider distribution of cycling visitors throughout the region eg in Berwickshire
- concern over the use of the A1, rather than the specified Coast & Castles route which is hilly in parts – combined with issues of cyclists crossing the A1
- the lack of basic cycle repair kits/services in some towns
- the lack of cafes open on Sundays – a key day for cyclists doing a ‘Sunday run’
- road surface issues – the number of pot holes and also the need to have built up edges and no raised ironwork
- issues with regard to cyclists dominating shared-use paths and the need to regularly check these paths for over-hanging vegetation
- the cost of Public Liability Insurance for cycle hire/small businesses
- the need for buses to be fitted with bike racks

Currently there are no packaged up attractions/ lunch and bike hire options to promote to potential visitors at present. The Borders only features in the programmes offered by a limited number of cycling tour operators – either for cycling holidays or for the purposes of training for participation in endurance events.

Much more could also be done to encourage locals to use their bikes instead of cars thereby making it more of a cycle friendly destination. The Council should consider how best to engage with grassroots cycling and schemes such as Bikeability alongside this tourism strategy.

8.1 Infrastructure and Future Development

From consultation responses it is clear that the general public would like to see a network of custom made off-road cycle routes between our key towns and smaller settlements, providing an expanded safer environment for cyclists of all ages and encouraging more people to park the car and use sustainable means of transport.

The key to the development of this network is the utilisation of the former railway lines that cross our area, although the promotion and development of these routes can be expensive to provide and normally require strong political support in order to succeed, especially with regard to some landowners not allowing access to their land for path development.

Wayfinding and Interpretation need to be considered as a whole; there is the opportunity to tell more of a story. Visitors need to be able to get onto a route and navigate that route easily. In some

towns where bike trails are developed and new entry points made into towns the signage can become confusing. There is also a preference for more detail on signs (distance/destination) rather than just a route symbol. Other suggestions include the preference for signs in both directions and signs alerting motorists to there being cyclists on certain routes. Existing signage needs to be considered and, if new trails are created, this needs a signage review process.

Suitable routes and trails to and from the stations in the region are needed and these should be a central consideration in determining the infrastructure needed to support the strategy. Better integration for tourists – railway companies, signed routes, overnight stay options with bike hire at stations.

8.2 Cycle Scottish Borders

The Cycle Scottish Borders website has recently been re-developed to ensure that it is mobile responsive and easily accessed by those on phones, tablets or from interactive screens at stations and in towns. The content will continue to focus on road cycling with mountain biking content currently being provided by way of links to the 7stanes site and Jedforest Trails. Future consideration needs to be given to how best to integrate mountain biking content going forward.

The content for this site is currently kept up to date on a freelance basis when budget can be found to pay for this service. This also applies to the upkeep of the social media presence on Twitter and Facebook. There is a need to explore options to ensure that the upkeep of these services can be maintained longer term. There is also a need to make the most of technological developments and trends in social media to promote the region as a cycling destination.

The website analytics highlight that the site suffers from a lack of promotion and web traffic therefore remains low in comparison to some of the websites for cycling events in the region.

The consultation exercise highlighted a desire for more to be done to promote safe cycling and the online presence provides a platform for key safety messaging.

8.3 Current Events

With an increase in the number of cycling events on offer across the UK there is a need to ensure that the events in the Scottish Borders are sustainable. The origin of the events is often different – some are developed by professional event organisers or charities, others by enthusiastic locals and others by established cycling clubs. Some of the events are more suited to locals or club members and others attract participants, spectators and the media from across the world.

The Tour of Britain in particular is in a class of its own; it sweeps in and out of the Borders bringing a significant entourage, thousands of spectators and considerable media coverage. The estimated Economic Impact for the area in 2015 was £307k. Average viewing figures for Stage 3 in 2015 from Cockermouth to Kelso were 250,000 for the live coverage, 385,000 for the highlights package and 36,000 from repeats. 13 TV broadcasters broadcast over 129 territories providing a total potential reach for the full event of 116,487,600. This event can only visit the region with the strategic intervention and financial support of EventScotland and the Council.

In comparison to the Tour of Britain, it should be noted that although it does not receive the same media attention or coverage, the Economic Impact for the Tour o' the Borders was £496k. This event has potential to grow and represents a good return to those public sector organisations and sponsors who support it.

Some cycling events happen on one day and others last up to two weeks. Some of the events due to the size and scale have a requirement to go through the Safety Advisory Group. A number of events seek Temporary Traffic Regulation Orders and close roads – sometimes these road closures are considered an inconvenience to the local community.

There are also smaller cycling events that are included in the wider programmes of Common Ridings and Festivals throughout the Borders.

Enduro events are a relatively new growth area which needs to be capitalised on, however issues exist over the suitability of trails for these events. The market is evolving quickly and is seeking more natural, man-made trails offering more variety to those currently on offer at Glentress. Assets which were a huge draw five or ten years ago are no longer seen as relevant; the market demands regular refreshing. This issue contributed towards the decision of EMBA to look for other host destinations for their Enduro World Series. The requirement for such trails for these international level events raises a number of issues over the responsibility for maintenance and also insurance-related concerns as a result of the trails not being sanctioned.

Events secure funding from a variety of sources – mainly the Council and EventScotland - and others do not bother. Sponsorship is not often readily available, and can take much time and effort to secure. Each event has a different business model and some of these models are not as profitable as others. With some events outgrowing their original model there is a need for organisers to do more to monetise their events in order to develop a more sustainable model, however, this is not always easy to achieve.

8.4 7stanes

Following a reduction in public sector funding the 7stanes Community Interest Company (CIC) was established in 2009 and had responsibility for the promotion of all the 7stanes trail centres. Unfortunately, it proved difficult to keep the CIC financially viable and it wound up on 31 March 2016. At this point the responsibility for the promotion of the 7stanes passed back to Forest Enterprise Scotland (FES). Given the importance of 7stanes there is a need to ensure the promotion of the trails is maintained and that this fundamental change does not impact directly on the numbers visiting the mountain biking centres in the area. FES has subsequently developed a new marketing strategy for the 7stanes. As previously stated, the 7stanes trails need to be adequately maintained and developed to keep them relevant to the market.

8.5 Collaboration and Communication

At the moment cycle tourism is often developed in isolation by the various stakeholders/groups and agencies. There needs to be a specific communication structure between the various departments within the Council and also engagement with key external agencies and partners so that the entire cycle tourism sector is catered for as changes occur and initiatives are developed.

There is a wealth of bike-related entrepreneurs based in the Scottish Borders and this well of knowledge and experience perhaps goes untapped when it comes to developing and promoting the region as a world class cycling destination.

9. The Opportunity

Looking at the wider cycle tourism market, consideration needs to be given to what needs to be done to develop facilities, events and the welcome cycling visitors receive throughout the area. The Scottish Borders led the way in establishing itself as a cycle friendly destination, underpinned by an exciting event calendar, but the impetus behind this earlier initiative has fallen by the wayside due to a lack of resource. The re-introduction of the Borders Railway provides further opportunities for product development.

Partners believe there is the potential for the Borders to achieve premier bike destination status and increase the economic benefit that this activity can bring to the area. These key partners should be engaged with as part of the delivery of the Action Plan. Furthermore following the demise of the 7stanes CIC there is a need for close working with FES and VisitScotland to ensure that the 7stanes receive the appropriate level of promotion to encourage future visitors. The continued growth in cycling events will require close working with EventScotland and event organisers to ensure that the Scottish Borders is considered as a key destination to host future international and national events.

There is the need to look at the many touch points cyclists come into contact with and identify areas for improvement – starting with the issues identified within the Destination Audit and the supplementary issues raised as part of the consultation exercise.

Ambitions of local communities such as Ettrick & Yarrow Valley, Craik, the Upper Tweed Valley, Chirside, Alewater Valley and Galashiels to develop their cycling offer should also be explored. Collaboration with Midlothian to develop cycling options along the Borders Railway corridor should also be considered. More needs to be done to get the area on the map and create a 'Destination Bike' status for the region.

An ambitious approach appropriately resourced is now required to underpin the proposition of the Scottish Borders actually *being* Scotland's leading cycling destination, rather than just laying claim to it.

9.1 The Tweed Valley

Glentress Forest is at the heart of the Tweed Valley and forms a key component of the Scottish Borders Tourism offer, attracting over 300,000 visitors a year. Over the last 15 years Glentress has grown to become a premier mountain biking destination, acting as the flagship 7stanes venue with over 50 miles of world class mountain bike trails.

The Glentress Masterplan, which has recently been approved, has been developed to guide the future sustainable development of the Glentress forest visitor attraction located in the Tweed Valley between Peebles and Innerleithen. The Masterplan presents a strategic context for this part of the valley and sets out proposals for development to enhance the visitor attraction. The Scottish Borders continues to suffer from a low average stay by visitors, at 2.2 days. With that in mind the Masterplan considers a wider programme of diversification and development that could be delivered, whilst protecting and enhancing the forest park setting.

FES need to allow for any refresh or modest provision of additional trail development (this poses a challenge as public resources are under pressure); hence the desire to develop new income streams through diversification into more commercial enterprises and charging for secondary activities and attractions.

Furthermore the Tweed Valley Mountain Biking Stakeholder Group has agreed a number of key actions, which will aim to continue the growth of mountain biking in the area. The Tweed Valley MTB Action Plan highlights opportunities to invest in the Glentress and Innerleithen trails and facilities, which jointly attract over 330,000 visitors per year to the Tweed Valley Forest Park. Development of additional outdoor and indoor activities, longer opening hours for local businesses and facilities and investment in accommodation and other facilities have also been identified by the Stakeholder Group as key to building on the efforts made so far.

Proposals for a mechanical uplift at Traquair Forest by Action for the Innerleithen Mechanical Uplift (AIMUp) were also considered by the Stakeholder Group. The AIMUp project is an exciting opportunity which aims to appeal to a range of forest users including families, walkers and mountain bikers of all disciplines, ages and abilities, including wheelchair mountain bikes. The intention is to create an innovative tourist attraction to increase visitor numbers and help to drive economic regeneration in the Tweed Valley and wider Scottish Borders. Such a development could be considered game changing and potentially could provide useful revenue which could contribute to the cost of ongoing maintenance of trails. It was however recognised that the best prospect for taking forward the proposal was through a private sector investment. It was considered not possible to provide the necessary financial support from Scottish Borders Council and public sector partners at a time when public money is very tight particularly with uncertainty about the projected visitor numbers and the ongoing sustainability of the project.

10. The Ambition

With the Scottish Borders suffering from a low average stay of 2.2 nights there is therefore a need to develop products that encourage visitors to stay longer, i.e. give them more things to do using a combination of existing assets and new products.

10.1 Routes & Infrastructure

As previously stated there are a number of issues identified with regard to the ongoing conditions of the roads and also the need to review the signage of cycle routes throughout the region.

Furthermore the following would enhance the product offering:

- An extension of the Tweed Valley Railway Path from Innerleithen to Walkerburn, and in time on to Galashiels;
- The development of a route from Peebles to Roslin;
- The development of an off-road route between Galashiels and Edinburgh via Peebles;
- A route between Melrose and Oxton utilising sections of off-road paths and quieter roads;
- The development of an off-road route between Newtown St Boswells and Coldstream via Kelso;
- The development of an off-road route between Earlston and Eyemouth via Duns, Chirnside and Reston
- A route between Galashiels and Stow train stations using the Southern Upland Way and trails network at Innerleithen and Glentress

Collaborative working with Sustrans Scotland and other key stakeholders will continue to help the development of the route network in the region, and some key elements of the above list are already being progressed. Other route suggestions are currently just aspirational and no firm plans

or funding are in place. Some will have issues with landowners that may frustrate community groups and public sector agencies and will take time to progress and hopefully resolve.

The Scottish Borders has the biggest concentration of world-class mountain bike trails, but a huge number are not officially mapped and therefore cannot be promoted. A solution needs to be found to be able to make better use of these assets.

10.2 Tourism packaging

Future development of attractive tourism packages for cyclists requires investment and collaboration with operators. The starting point will be the key actions identified in the Tourism Destination Audit. Opportunities to explore specific product ideas could potentially be undertaken as part of pilot projects.

10.2.1 Cycling Hubs

There is scope to develop a number of towns or villages as cycling 'hubs'. A hub could have

- a range of good cycling routes to venture out from
- cycle hire opportunities (or car parking for those who have brought their own bikes)
- a good range of businesses welcoming cyclists both in the town and along the routes – including providers of bike repair essentials where no bike hire/shops exist
- route maps/an App
- cycling tours on offer (see 9.2 .2 for further thoughts)
- cycle racks
- cycle events, where possible
- discounts for visiting cyclists
- extended opening hours in the summer months for bike hire
- a pilot project for 'Quiet Roads' in the vicinity of a hub

The Stirling Cycle Hub, supported by ScotRail, offers much of the above, and could be used as a model to explore opportunities to develop a physical presence at a railway station. ScotRail welcome the opportunity to explore options in the Scottish Borders. Other 'hubs' have the potential to be virtual without the need of a physical presence or 'mini hubs' where a community goes the extra mile to welcome visiting cyclists.

Some towns already offer some of the above but are not promoted as a hub, such as Peebles. This town's demographic has changed over recent years with many bike-related and lifestyle businesses now established. Much more could be done to harness the product and establish Peebles as a bike town, much as Fort William has done in establishing itself as the Outdoor Capital.

There is scope for other towns and villages to develop a cycling offer. It should be noted that Newcastleton has previously been positioned as the most cycle friendly destination in Scotland linked to the number of Cyclists Welcome Scheme members in the village – in reality this would now need to be re-visited. Eyemouth may also provide an opportunity to develop their cycling offer alongside their coastal walking and diving offer. Lilliesleaf may also provide scope to explore what might be possible in a small community with a quiet network of roads.

Tourism businesses and Community Councils have a role to play with the public sector in any future developments, and this may include exploring options for community- operated bike hire solutions.

Sustrans Scotland is supportive of the 'Cycle Friendly Roads' initiative (as piloted by Clackmannanshire Council) and an ambition for a 'quiet roads' initiative aligned to a hub may be eligible for match funding through the Sustrans Scotland Community Links programme.

10.2.2 Railways - Cycle Hire and Tours

With limited capacity on the Borders Railway, there is a need to explore other options and ScotRail has indicated that they would like to work with partners, to support measures which will allow people to hire bikes once they have reached the Borders. ScotRail is looking to work with partners to find third party funding and identify viable locations where "Bike & Go" could be developed and installed. Alongside this and in order to promote cycle hire further in the Borders ScotRail would be keen to work with partners to develop deals to make cycle hire in the area more attractive. This could be in the form of discounts at local cycle hire shops similar to those available in the Aviemore and Inverness area or the development of other all-inclusive packages.

As yet there is no operator offering visitors arriving by train with the opportunity to be met with a bike and taken on an afternoon/day tour of the adjacent area. These tours could visit key attractions and stop for lunch or afternoon tea thereby providing opportunities to showcase the best of the Borders Food and Drink offer and encourage geographic spread around the area.

A further, basic offering would be to have cycle hire on offer at Galashiels or Tweedbank with self-guided routes on offer. Discounts at attractions and food stops could be part of the hire package. A pilot project might involve the training of local cyclists to act as cycle tour guides.

There is potential to do more to promote the existing cycling options and explore other opportunities from the stations in the region, and also from Berwick upon Tweed.

10.2.3 Themed routes

Many other destinations have themed routes on offer and these routes can provide good hooks for promotional purposes. Consideration should be given to developing themed routes, eg Big Houses, food and drink, arts and crafts, Sir Walter Scott or the Borders Brains of Hume, Hutton etc.

These routes could either be offered as cycle tour packages or as self-guided route options and suit different visitor needs and interests.

10.2.4 Baggage Transfer

With a number of long distance routes passing through the region there is scope to do more with baggage transfer to enhance the offer.

10.2.5 Cyclists Welcome Scheme Plus

Other nations operate Velohotels and in Italy there is Italy Bike Hotels who specialise in welcoming cyclists to a network of super-cycle friendly accommodation. Their service goes way beyond the basic criteria required to be a Cyclists Welcome Scheme member. Consideration should be given to whether there is scope to expand the current Cyclists Welcome Scheme.

10.2.6 Cross Border Initiatives

Visitors do not see regional boundaries. There is scope to explore joint working with neighbouring Local Authorities eg Midlothian, East Lothian, South Lanarkshire and Dumfries & Galloway. Midlothian in particular provides opportunities around the Borders Railway. Newcastleton and Hawick may also provide some opportunities to explore joint working with Kielder Forest.

With the East Coast Main Line stopping in Berwick upon Tweed there is scope to maximise opportunities in East Berwickshire and beyond. Wooler in Northumberland is also active in cycling promotion and there are regular cycling events crossing from Wooler into the Scottish Borders that provide potential opportunities for joint working.

10.2.7 Events

For some visitors, events provide a reason to visit – sometimes just for the day, but some generate overnight stays not only for participants, but also their family supporters providing further economic benefit to the area. Sportive events, specifically those with a charity theme, remain popular and the region is well placed as a venue for a number of them to be held throughout the year. There is also scope to do more with family events. An event series could be developed working with local cycling clubs and event organisers that will attract visiting cyclists.

Working with EventScotland, specific events such as the Tour of Britain should be encouraged to return as they can generate large crowds of spectators in towns and along the route and valuable media coverage which brings economic benefit to the area. The region should, again with the support of EventScotland, also explore what other significant or international events could be held in the region to help raise the profile.

Options should be explored to make more of event routes such as the Tour o' the Borders, the Tour de Lauder and also the Tour of Britain stages held in the region. These routes should be promoted as should any King of the Mountains climbs which will help add credibility to the offer. Permanent signage would help enhance the offer. Such features will enhance the routes and create more memorable experiences.

Events also provide useful content for promotional activity and increase traffic to the Cycle Scottish Borders website. With the range of events now on offer in the calendar, there is a need to maximise the opportunities to encourage those in attendance to stay longer, come with family/friends or do more whilst in the area. Businesses with an interest in the cycle tourism market should be encouraged to develop offers and packages and to work together. Packages around the 2017 Tour of Britain should specifically be considered.

The role of community facilities such as the Crook Inn's involvement in, the through- Borders event, Ride to the Sun should be explored as there can be a direct benefit to the community and also help convey a welcome to visiting cyclists. Conversely, consideration also needs to be given to the impact on communities of events on closed roads, and also on the wider events calendar in some areas.

Sponsorship of events should also be considered as opportunities for inward investment which might offer corporate hospitality packages.

Event organisers should be supported by Scottish Borders Council and where relevant by EventScotland to allow events to develop if it furthers economic benefit to the region. Advancements in technology and equipment should also be considered in the delivery of events and initiatives such as White Space Technology may help with communications during events.

ScotRail is keen to support the sustainability of the Borders Railway through developing tourism and recognise the opportunities that cycling plays within this context. ScotRail is happy to work with partners in practical ways to encourage and develop this market through promotional and operational support for events that matches their capabilities with customer expectations.

With limited funds it is important to ensure that all budgets spent on events are maximised as promotional opportunities to raise awareness of the region as a cycle tourism destination. Funding requirements from the public sector should ensure that event organisers promote the destination as part of their event promotion.

10.3 Promotion

This strategy has identified that the region has very good cycling assets in the shape of routes, trails, services and of course events, but they are currently under-promoted in what is an increasingly competitive environment. Further product development as detailed above will enhance the offering and there will be 'new news' to communicate to potential visitors. Knowing more about the target markets through the development of segmentation will help focus activity. There is a need for the development of a brand to cover all of the cycling assets in the region.

With no promotional budget the Cycle Scottish Borders website under-performs with low traffic to the site in comparison to some of the region's events and other destinations. As the main showcase for the cycling product this needs to be addressed; currently the destination has no voice in the marketplace. It is crucial that the Scottish Borders secures the necessary budget and develops an appropriate promotional plan which meets the ambitions of the region to be the premier cycling destination in the UK. A partnership approach will need to be implemented to ensure that all promotional opportunities are maximised, eg with input from the Area Tourism Partnership, Forest Enterprise Scotland and also VisitScotland. Event organisers and cycle tourism related businesses should also have a role to play in promoting the region. Clarity on who will take the lead in the marketing will also need to be sought.

The consultation has highlighted the desire to promote the 'best' of the region's cycling assets such as best views, best big climbs, best for families, best for thrills, best for history etc. All of which will help create a more memorable experience and hopefully encourage repeat visits. It was also suggested that consideration should be given to appointing a cycling ambassador to help raise awareness.

The website content needs to be expanded to contain more details on mountain biking options and consideration needs to be given on the inclusion of core paths. Some of the long distance routes have symbols that are used on the route signs. These symbols are not carried through to the website and this is something that should be looked at as part of the promotional activity.

10.4 Businesses

In one of the previous LEADER funded cycling projects a Borders Bike Kit was developed to provide tourism businesses with essential information to allow them to welcome cyclists. Harnessing the knowledge and support of tourism and bike-related businesses widens the promotional message and also strengthens the product offering.

Sustrans Scotland has led on the development of a Leisure Cycling Business Toolkit, due to be launched in November 2016. This toolkit is designed for any tourism business in Scotland that wants to find out more about the leisure cycling tourism opportunity. Post launch, there will be opportunities to work with Sustrans Scotland as they deliver a series of regional Business Engagement Workshops.

Previously a Scottish Borders Recreational Cycling Group was established, and there is now a need to explore whether a similar Group should be established eg a Scottish Borders Cycle Tourism Interests Group. Such a Group will allow an exchange of ideas and access to knowledge, experience and resources that will help drive forward key actions and allow the region to maximise opportunities.

11. Delivery

Much has been proposed in this document, and the following Action Plan identifies how it may be delivered. A budget for the activity needs to be secured and the Council will need to identify a champion to drive forward the strategy and deliver the agreed outputs accordingly.

In order to realise the potential and secure the Scottish Borders as the premier cycling destination within the UK, partnership working is essential. Methodologies need to be identified to coordinate the delivery of the proposed outcomes. The Council must facilitate effective communication across the cycle tourism sector and collaborate across public, private and third sectors.

Appendix 1

The following participated in the Consultation on the Draft Strategy –

- Scottish Enterprise
- Scottish Borders Chamber of Commerce
- VisitScotland (including the EventScotland team)
- Scottish Tourism Alliance
- Forest Enterprise Scotland
- Abellio ScotRail
- Borders Railway Blueprint
- Developing Mountain Biking in Scotland/Scottish Cycling
- Mountain Bike Centre of Scotland
- National Cycle Tourism Forum
- Cycling Scotland
- Sustrans
- Scottish Borders Area Tourism Partnership
- Live Borders
- Newcastleton Business Forum
- Tweed Valley Mountain Bike Stakeholder Group
- AIM Up
- Local community groups and interests such as Ettrick & Yarrow, Tweed Valley Tourist Consortium, Craik etc
- Private sector cycle tourism related businesses and clubs– eg event organisers, tour operators, skills/guiding companies, bike hire, accommodation providers, attractions, local cycling clubs, etc

Appendix 2

