

7stanes Phase 2 Evaluation

Executive Summary

Background

Forestry Commission has been at the forefront of the provision of mountain bike trails and infrastructure for over a decade. The 7stanes project was initiated in the winter of 2001 as part of FCS's on-going commitment to this provision.

Phase 2 of the project was intended to take the project and the related economic impacts to a new level with the overall Vision altered to:

“Maintain and develop the South of Scotland as a world-class mtb destination; supporting tourism and rural-based business and bringing health, wealth and enjoyment into the natural environment.”

Method

The study method included a mix of desk-based analysis and survey work with partners, visitors, local businesses and community groups.

Conclusions

Project Delivery

The partnership approach was a key part of the project's success and will be important to maintain in the future. This will ensure the right mix of skills and support is available to take the development forward.

Performance Against Targets

Analysis of performance against the ERDF targets for Phase 2 shows:

- 222,000 visitors (131% of target);
- 139 gross jobs (204% of target); and
- gross cost per job £6,900 (target £14,000).

The project has performed very well against its ERDF targets.

Net Additional Impacts

However, to assess the ultimate impact on the local (South of Scotland) and national (Scottish) economies it is necessary to calculate the net economic impact. The analysis shows that the impacts for the project (including Phase 1 and 2) are:

- just under 400,000 visitors (394,626, which would put it within the top twenty most popular visitor attractions in Scotland with similar visitor numbers to Stirling Castle);
- a large non-local market at 80%;
- increase in quality ratings of the trails at 75% very good (up from 68% in 2004)
- net additional impacts of:
 - £9.29m expenditure, 204.6 FTE jobs and £3.72m GVA in the South of Scotland
 - £7.58m expenditure, 227.5 FTE jobs and £4.14m GVA in Scotland; and
- an ERDF cost per net job of £8,396 (at the South of Scotland level) which is actually lower than the gross cost per job target.

Whilst the increase in visitor numbers has generated additional impacts this is not the only reason. The increase in the proportion staying overnight, average length of stay and daily expenditure have also contributed to this. Therefore, all four factors have been key achievements of Phase 2. The project has performed very well in terms of net additional impacts and cost effectiveness.

Local Business Engagement

Phase 2 has seen more proactive engagement with local businesses by the project team and partners. The two business groups (Tweeddale Consortium and a subgroup of the Dumfries and Galloway Chamber of Commerce) are also developing a number of activities and initiatives which will link to the opportunities generated by 7stanes.

The project has been helping to contribute to new business formation and providing benefits to existing businesses (both onsite and offsite). A number of businesses, in recognising the opportunities offered by the sector, have been investing in facilities designed to meet the needs of the mountain bike market.

Achieving the Phase 2 Vision

There was a clear vision for Phase 2 and the extent to which it has been achieved includes:

- **achieving sustainable economic growth:** the project has performed well in economic impact terms. Continuing this in the future will be dependent on adequate maintenance, refreshment of the product and marketing & promotion;
- **building on the quality reputation:** there has been very positive feedback on the quality of trails from media, partners, businesses and the mountain bikers. The ratings of the trails by mountain bikers have increased since 2004;
- **working with more business:** as discussed earlier there has been much greater engagement with businesses in Phase 2, although there is still further room for development in this area;

- **promoting Scotland internationally:** awareness of the 7stanes brand and the trails has increased, as has the number of visitors from elsewhere in the UK and overseas. However, the level of awareness in the UK is much higher than overseas so the latter may be more of a focus for future promotional activity; and
- **working with schools, communities and improving the nation's health:** Phase 2 has seen an increase in the number and range of groups using the 7stanes, including schools and community groups. The increased use by schools is particularly encouraging given their increasing focus on health and wellbeing. There are opportunities to develop this further but this would be dependent on collaboration with other organisations.

*Source; 7stanes Phase 2 Evaluation – December 2007
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EKOS Ltd in partnership with Tourism Resources Company*