



VELO-CITY  
GLOBAL 2014  
CELEBRATION  
OF CYCLING  
ADELAIDE, MAY 27-30

## The Trail Centre Model

Dafydd Davis MBE  
Trails by Dafydd Davis



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- What are Trail Centres?
- How and why did they happen?
- How have they influenced mountain biking in the UK?



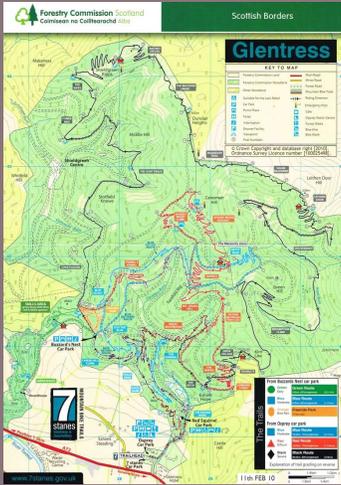
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### WHAT ARE TRAIL CENTRES?

- Dedicated trails
- Purpose built trails
- Circular cross country trails
- Accessible trails
- Prescribed routes
- Trail hierarchies
- Centred on a single trailhead, often with facilities



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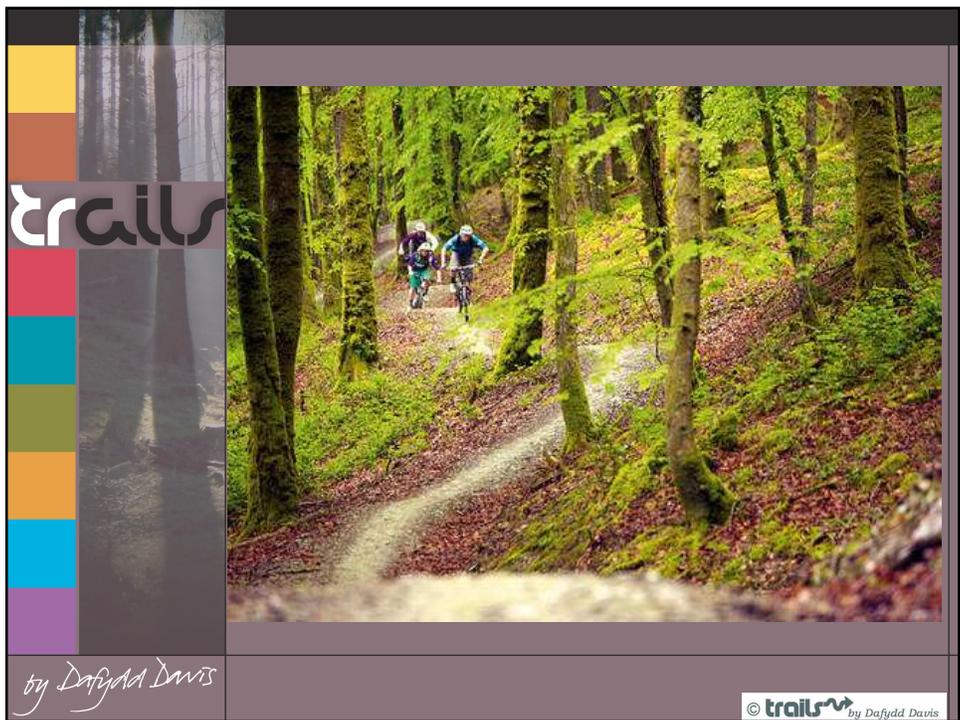
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## HOW AND WHY DID THEY HAPPEN?

- No previous evidence of demand, but ....
- 1994 – Coed Y Brenin, North Wales
- UK’s first purpose built, “official” mountain bike trails
- Created a template for future development
- Gathered information on the market
- Gathered data on visitor numbers, profiles and economic impacts
- Provided the impetus for strategic development

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## THE COED Y BRENIN STORY

- 1994 - 5,000 hectare Forestry Commission forest in North Wales
- Small visitor centre – 12,000 recreational visitors per year
- Small recreational trail network
- Brief to increase visitor numbers – but with no budget



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**1994 – 1996**

- Developed 3 circular mountain bike trails, using purpose built singletrack and forest roads
- Trails of an accessible standard
- Clear waymarking
- Effective trail information
- 1994 - visitor numbers 12,000
- 1996 – visitor numbers 70,000

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**1996 – 2000**

- Further development of mountain bike trails
- Up to 100km of waymarked trails
- Visitor numbers increased to 150,000 per year
- Extensive visitor monitoring and evaluation
- Visitor profiles and market segmentation developed
- Economic impact quantified

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### VISITOR PROFILES

- 25 – 50 years old
- 70% Male / 30% Female
- Had spent on average £800 on bikes
- Rode at least once a week
- Mixed levels of fitness and technical ability



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### VISITOR SURVEYS (EVALUATION)

#### WHAT ATTRACTED YOU TO COED Y BRENIN?

- Waymarked, circular rides
- Lots of singletrack
- Accessible trails
- Consistent quality
- Trailhead facilities
- Authentic experience



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**ECONOMIC IMPACT – 2000**

- 70% of all mountain bike visitors were weekend visitors, staying a minimum of 2 nights in the local area
- Average spend per head, per night £50
- Annual economic impact £5.8 million



**2013 – ANNUAL ECONOMIC IMPACT ESTIMATED AT £9 MILLION**

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**FURTHER MARKET RESEARCH 1998**

Carried out in conjunction with:

- British Cycling
- Bike Biz
- Mountain Bike Magazines



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**HOW MANY BIKES IN BRITAIN (1998)**

- 1 per household – estimated 20 million bikes

**HOW MANY MOUNTAIN BIKES?**

- 3 in 5 bikes – estimated 12 million mountain bikes

**HOW MANY ACTIVE MOUNTAIN BIKERS ARE THERE?**

- 1,500 Cross country racers (British Cycling)
- 700 Downhillers (British Cycling)
- 30,000 Copies of MBUK sold each month
- Rough estimate – 50,000 active mountain bikers per year

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**MARKET SEGMENTATION**

Market research, visitor evaluation and visitor monitoring enabled the following picture of the mountain bike markets to be developed:

- Gravity focused riders – downhillers, freeriders etc.
- Sport riders – cross country racers etc.
- Trail riders
- Enthusiasts
- Family and Leisure

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	<h2>MARKET SEGMENTS</h2> <h3>DOWNHILLERS/FREERIDERS</h3> <ul style="list-style-type: none"> <li>• Small but growing segment</li> <li>• Mostly male 14 – 35</li> <li>• Specific requirements</li> <li>• Difficult to manage</li> <li>• Unsanctioned trails</li> </ul>
	
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	<h2>MARKET SEGMENTS</h2> <h3>SPORT RIDERS</h3> <ul style="list-style-type: none"> <li>• Competitive cyclists</li> <li>• Involved in other cycle sports</li> <li>• Limited outdoor skills</li> <li>• Members of clubs</li> <li>• Fit, skilled riders</li> <li>• Mostly male</li> <li>• Small segment</li> </ul>
	
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 	<h2>MARKET SEGMENTS</h2> <h3>TRAIL RIDERS</h3> <ul style="list-style-type: none"> <li>• Skilled outdoor enthusiasts</li> <li>• Fit</li> <li>• Predominantly male</li> <li>• Members of pressure groups</li> <li>• Challenging rides</li> <li>• Rights of Way</li> <li>• Small segment</li> </ul>	
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 	<h2>MARKET SEGMENTS</h2> <h3>ENTHUSIASTS</h3> <ul style="list-style-type: none"> <li>• Recreational riders</li> <li>• Wide spectrum of ability and fitness</li> <li>• Limited outdoor skills</li> <li>• 30/70 male/female</li> <li>• Travel to ride</li> <li>• Want waymarked trails</li> <li>• Ride in groups</li> <li>• Largest segment</li> </ul>	
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## MARKET SEGMENTS

### FAMILY AND LEISURE

- Little or no navigation or map reading skill
- Little or no outdoor skills
- Limited confidence
- Low levels of bike handling skill
- Ride infrequently
- Require very accessible and technically easy trails

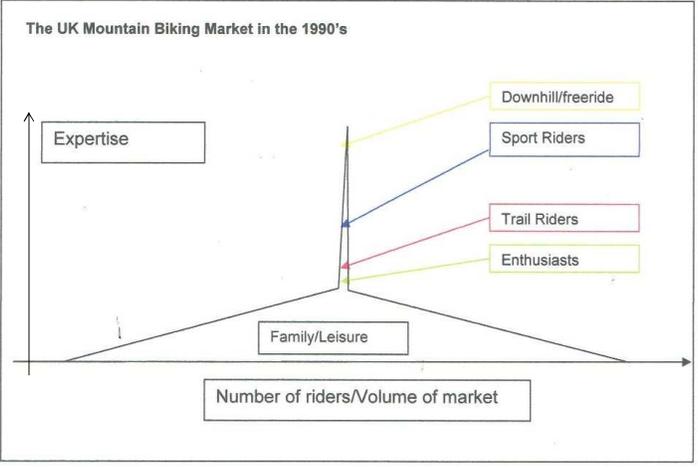






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The UK Mountain Biking Market in the 1990's



OBVIOUS POTENTIAL FOR GROWTH!





**WHERE DID THIS LEAD TO?**

**THE WELSH MOUNTAIN BIKE INITIATIVE 2000 – 2003**

- National strategy
- Partnership between:
  - Forestry Commission Wales
  - Welsh Tourist Board
  - Welsh Assembly Government
  - Local Authorities
  - Cyclist Touring Club (CTC)
  - Sustrans

Roll Out of Coed y Brenin model at 5 locations across Wales

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**WELSH MOUNTAIN BIKE INITIATIVE**

- Marketing – Welsh Tourist Board strategic marketing campaign
- Capital funding – Welsh Assembly Government
- Revenue funding – partnerships with local authority governments at each site
- Management and maintenance – partnership between the Forestry Commission Wales and Local Authorities



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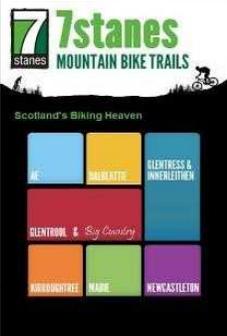
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## 7 STANES, 2002 – PRESENT

- Development of 7 sites on the trail centre model in the south of Scotland
- Largest and most successful trail development ever in the UK
- Took the trail centre model to another level
- Estimated 400,000 visitors per year









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## HOW TRAIL CENTRES HAVE INFLUENCED THE UK MARKET





13



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## HOW TRAIL CENTRES HAVE INFLUENCED THE UK MARKET

- Trail centres have been developed and aimed squarely at the enthusiast market and this has stimulated unprecedented growth in that segment
- This segment now defines the UK mountain bike market, and would appear to still be growing



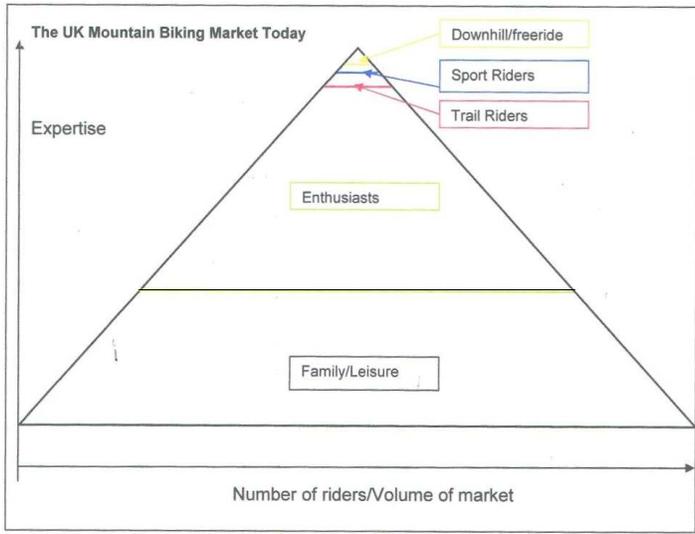
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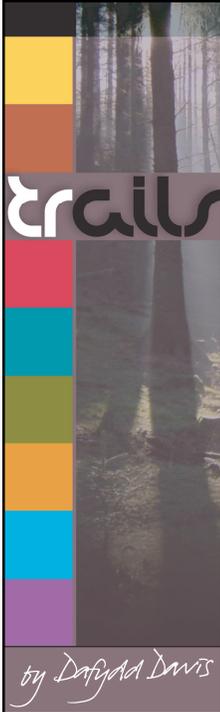
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## HOW TRAIL CENTRES HAVE INFLUENCED THE UK MARKET



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## THE KEY TO THIS DEVELOPMENT

- An understanding of the market – both existing and potential
- Developing the right trail models
- Developing the right kinds of trails
- Developing key sustainable partnerships
- Joined up development and marketing
- Vision
- Leadership



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