

YMUNWCH Â'R MUDIAD

sustrans

JOIN THE MOVEMENT



TOOLKIT SECTION 3

ENCOURAGING MORE
WALKING & CYCLING



CYSYLLTU
LINKING
UP





Sustrans is the charity making it easier for people to walk and cycle.
We connect people and places, create liveable neighbourhoods,
transform the school run and deliver a happier, healthier commute.
Join us on our journey. www.sustrans.org.uk

Sustrans is a registered charity in the UK No. 326550 (England and Wales) SCO39263 (Scotland)



CONTENTS

INTRODUCTION	04
BACKGROUND	05
POLICY CONTEXT	06
ACTIVE TRAVEL (WALES) ACT 2013	08
PATHS FOR EVERYONE	10
PARTICIPATION IN WALKING AND CYCLING	11
HEALTH BENEFITS OF WALKING AND CYCLING	12
CASE STUDY - BIKE LIFE	14
CASE STUDY - LET'S WALK CYMRU	15
ECONOMIC BENEFITS OF WALKING AND CYCLING	16
CASE STUDY - TOURISM SPEND ON THE NCN	18
CASE STUDY - WALES COAST PATH	20
CASE STUDY - SOUTH WEST COAST PATH	21
ENVIRONMENTAL BENEFITS OF WALKING AND CYCLING	22
CASE STUDY - GREENER GREENWAYS	23

THE IMPORTANCE OF ENCOURAGING MORE WALKING AND CYCLING

In this final section we set out the policy context, trends in participation, as well as the social, economic and environmental benefits of developing better infrastructure to encourage more people to walk and cycle on a regular basis.



BACKGROUND



Tackling poverty and building resilient local economies are key issues for the Welsh Assembly Government. Rural poverty remains a critical concern in Wales, with an average of 700,000 people (23% of the population) living in poverty in the three years to 2014-15 .

Transport poverty is a critical issue in much of rural Wales. In the Wales Index of Multiple Deprivation (<http://wimd.wales.gov.uk>) rural local authorities in Wales are ranked as some of the most deprived areas in relation to access to services. Many rural areas have seen a decline in amenities such as shops, post offices and health services. Most also have poor public transport provision making it harder for people on low incomes to access services and employment.

By improving walking and cycling links we can help to improve the ability of people in rural areas to undertake short journeys on foot or by bike, allowing them to access to the services and employment opportunities they need.

POLICY CONTEXT

In recent years the National Assembly for Wales have passed two new Acts which are particularly relevant to walking and cycling. These are:

WELLBEING OF FUTURE GENERATIONS (WALES) ACT 2015

The Well-being of Future Generations Act came into force in April 2016 and sets out a common aim for the public sector 'to improve the economic, social, environmental and cultural well-being of Wales in accordance with the sustainable development principle', i.e. ensuring 'that the needs of the present are met without compromising the ability of future generations to meet their own needs'.

Public bodies need to make sure that when making their decisions they take into account the impact they could have on people living their lives in Wales in the future and do what they do in a sustainable way.

Within the Act there are seven goals:

A PROSPEROUS WALES

An innovative, productive and low carbon society which recognises the limits of the global environment and therefore uses resources efficiently and proportionately (including acting on climate change); and which develops a skilled and well-educated population in an economy which generates wealth and provides employment opportunities, allowing people to take advantage of the wealth generated through securing decent work.

A RESILIENT WALES

A nation which maintains and enhances a biodiverse natural environment with healthy functioning ecosystems that support social, economic and ecological resilience and the capacity to adapt to change (for example climate change).

A HEALTHIER WALES

A society in which people's physical and mental well-being is maximised and in which choices and behaviours that benefit future health are understood.

A MORE EQUAL WALES

A society that enables people to fulfil their potential no matter what their background or circumstances (including their socio-economic background and circumstances).

A WALES OF COHESIVE COMMUNITIES

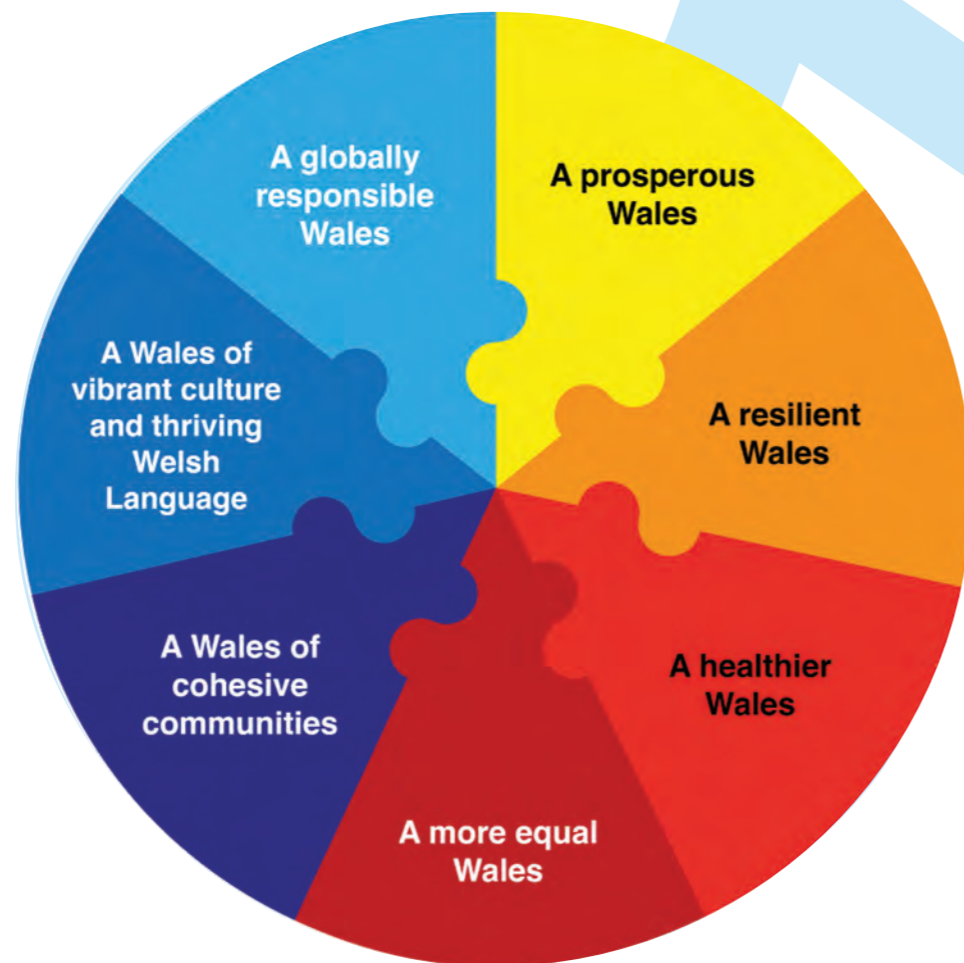
Attractive, viable, safe and well-connected communities.

A WALES OF VIBRANT CULTURE AND THRIVING WELSH LANGUAGE

A society that promotes and protects culture, heritage and the Welsh language, and which encourages people to participate in the arts, and sports and recreation.

A GLOBALLY RESPONSIBLE WALES

A nation which, when doing anything to improve the economic, social, environmental and cultural well-being of Wales, takes account of whether doing such a thing may make a positive contribution to global well-being.



In applying the principle of sustainable development, public bodies need to demonstrate they have used the following five ways of working:



PATHS FOR EVERYONE - SUSTRANS REVIEW OF THE NATIONAL CYCLE NETWORK

The National Cycle Network is a network of 16,575 miles of signed routes for walking and cycling. It spans the UK and is used by millions of people each year.

Sustrans has spent more than two years completing the first ever review of the National Cycle Network to unlock its true potential for everyone. With this review, Sustrans wants to build on its success and inspire a long-term, exciting future for the Network.

Sustrans has developed level of service measures, design principles and quality standards that will keep assessing the conditions of the network and inspire positive change.



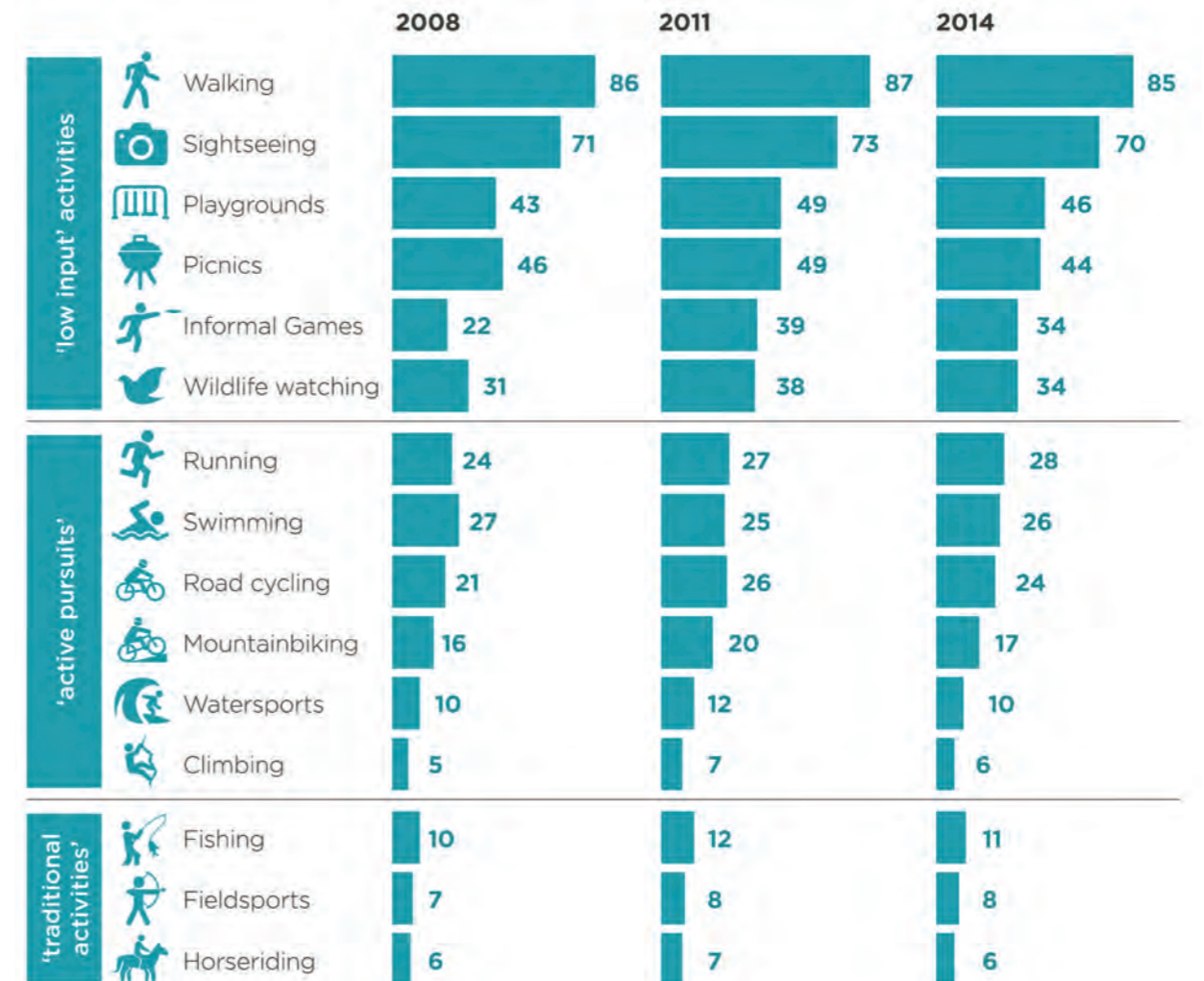
[PDF](#) Click to download

PARTICIPATION IN WALKING AND CYCLING

General patterns of participation in outdoor recreation in Wales have been monitored and recorded since 2008 through the Welsh Outdoor Recreation Survey (WORS) which captured data during 2008, 2011 and 2014 respectively.

A wide range of activities are reported to have been enjoyed by visitors to the outdoors though the most popular, as identified in the WORS, are low input in nature. These include pursuits such as walking, sightseeing, taking children to playgrounds, picnicking, playing informal games, and watching wildlife.

The most popular activities and their changing rate of participation over the life of the WORS is shown in the graphic below. (source: Welsh Outdoor Recreation Survey). Some 85% of those surveyed said they participated in walking for recreation, that's an incredibly high percentage of the adult population. Similarly, almost 25% of those surveyed said they regularly participated in road cycling and over 15% in mountain biking.



HEALTH BENEFITS OF WALKING AND CYCLING

Walking and walking groups meet a specific need for accessible opportunities for people to participate in moderate physical activity at Government recommended levels.

It's recommended that adults take part in 2.5 hours of moderate activity per week, but current physical activity levels in the UK are low: only 40% of men and 28% of women meet these minimum recommendations.

In a their report Walking Works, 2013, Ramblers and Macmillan found that walking addresses many of the reported barriers to people being physically active, such as lack of time, money and physical limitations. It is also accessible to those who could most benefit from being physically active, such as older people and people on low incomes.

Download the report here:



An estimated 7,940 serious long-term health conditions have been averted by walking and cycling on the Network, saving the NHS over £51 million in expenditure, equivalent to the average annual salary of 2,206 nurses.

The benefits of walking and cycling are well documented. As well as improving your physical health, such physical activity can be used to overcome, and even prevent, depression and anxiety. According to the Mental Health Foundation, physical activity can be as effective as medication and counselling. So by making it easier for people to get out and walk or cycle you are helping to improve the health of your community.

Nordic Walking uses 90% of your skeletal muscles and burns 46% more calories than normal walking.

A 20 minute bike ride to work burns the equivalent calories found in a cappuccino, a bar of chocolate or a 175ml glass of wine.

We all know that getting out walking or cycling burns calories, gets your heart pumping and works your legs and abs. It can also lift your mood, put a smile on your face and improve your general health and wellbeing.

Being inactive is a serious threat to our collective health - for example research shows that keeping physically active can reduce the risk of heart and circulatory disease by as much as 35% and risk of early death by as much as 30% .

There is overwhelming evidence that walking is the most accessible, effective and popular physical activity. Outdoor walking groups have been found to have health benefits over and above making people more physically active. Wide ranging benefits have been found in measures of health including:

- Blood pressure
- Resting heart rate
- Body fat percentage
- Total cholesterol
- Risk of depression, and
- Quality of life for physical functioning



www.bhf.org.uk/informationsupport/publications/statistics/physical-activity-statistics-2015

Hanson S, Jones A. Is there evidence that walking groups have health benefits? A systematic review and meta-analysis. Br J Sports Med 2015;49:710-715

CASE STUDY

BIKE LIFE Sustrans



Bike Life is the UK's biggest assessment of cycling in cities. It was delivered by Sustrans in collaboration with 15 UK cities and urban areas.

The report models the benefit cycling could produce between 2017 and the year 2040 with an ambitious commitment to double the number of cycling trips every eight years in order to deliver change. The report uses data from Bike Life 2017 from the seven original cities: Belfast, Birmingham, Bristol, Cardiff, Edinburgh, Greater Manchester and Newcastle.

If this target could be met it would equate to increasing the number of cycling trips from 123 millions trips made in 2017 in the seven cities to a staggering 1 billion+ by 2040. The impacts this could achieve include:

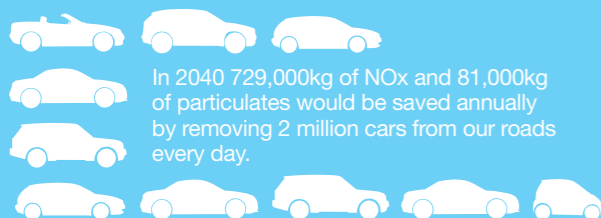
By 2040, 2 million cycle trips a day in the seven cities that could otherwise have been made by car. If all of these cars were in a traffic jam it would stretch for 3,110 miles or 2.5 times the length of the UK.



Between 2017 and 2040 cycling could avert 34,000 long term health conditions saving the NHS in the UK £319 million that's the equivalent of the annual salary of 13,481 nurses.



In 2040, 345,000 tonnes of greenhouse gas emissions would be saved annually, equivalent to the carbon footprint of 73,000 people, roughly the population of Chester.



In 2040 729,000kg of NOx and 81,000kg of particulates would be saved annually by removing 2 million cars from our roads every day.



CASE STUDY

LET'S WALK CYMRU



Let's Walk Cymru is a successful health intervention which has, over many years, supported communities to develop health walks to improve physical activity and health through walking. It was initiated in 2003 under the British Heart Foundation as 'Walking Your Way to Health' and has sat within different organisations. The programme has been delivered by Ramblers Cymru since May 2012.

An average week sees around 135 health walks across Wales being provided by volunteers for some 1,767 walkers. The groups meet at a local meeting point for a short led walk in their local area. The benefits reported by the walkers attending these group walks are not just better physical health and fitness, but also increased mental and social well-being.



ECONOMIC BENEFITS OF WALKING AND CYCLING

Walking and Cycling are now widely acknowledged as two of the most important elements of tourism in Wales, benefiting from our world class landscape, heritage, attractions and facilities. In 2017, walking and cycling on the NCN benefitted the UK economy by an estimated £1.3 billion.

UK Cycle Accessories Market Value 2014
£956m



UK Cycle Accessories Market Value 2015
£1.35bn



Source: Mintel 2015

The last decade have seen significant developments in the walking and cycling network in Wales, such as the opening of the Wales Coast Path in 2012 and the creation of new routes such as parts of the Valleys Cycle Network and Lôn Las Cefni, enhancement of Trails such as the Taff Trail and Lôn Las Ogwen, and of course the introduction of the Active Travel (Wales) Act in 2013.

Wales also boasts major cycle events such as the Tour of Britain, Junior Tour of Wales, the British Cycling National Road Championships, Valleys Velo Sportive and the Velothon. And now we can boast a Tour de France Champion in Geraint Thomas too.



According to the Great British Tourism Survey (2015), cycling is worth £90 million to Wales each year through daily visits and overnight stays. Around 300,000 overnight visits to Wales each year involve cycling and/or mountain biking with an annual worth between £55 and £60 million.

CYCLISTS SPEND A LOT!

According to recent research by Mintel, the bike is simply the tip of the iceberg as today's cyclists are splashing out more on cycling accessories than the bikes themselves. While UK sales of bikes only were set to top the £1bn mark by the end of 2015, Britons were expected spend an even more impressive £1.35bn on cycle accessories.

Similarly the Ramblers Association estimates that walking tourism in rural and coastal Wales contributes over £550 million to the economy.



Its not just accommodation providers who benefit from this spend. The increasing number of day visits involving walkers and cyclists, who might generally spend less than those staying overnight, nevertheless represent an important market for food and refreshments. Equally, many visitors are choosing to visit attractions such as country parks and castles on bike - provided of course that there are facilities there to meet their needs in terms of security, repairs etc. In 2017, leisure users on the NCN were estimated as having spent £2.5 billion in local businesses.

Long distance cycle routes, which are predominantly rural, can generate as much as £30 million per year to the local economy; enough to sustain over 600 full time equivalent jobs. Coast 2 Coast (Northern England) carries over 240,000 trips per annum (of which 14,000 is end-to-end usage), stimulates a spend of £10.7 million in the route corridor, and supports up to 173 FTE posts. The Way of the Roses (Northern England) carries over 130,000 trips per annum (of which 7,000 is end-to-end usage), stimulates a spend of £3million in the route corridor, and supports up to 60 FTE posts.

And its not just the direct spend that aids the economy. In a report undertaken by LSE on behalf of British Cycling and Sky looked at the wider impact of cycling on the economy. You can download the report here:



Route	Year	Distance	Cycle Trips	Of which end to end	Total yearly expenditure	Jobs supported
C2C	2006	287 Km	241,051	14,000	£10,700,000	173
Coast & Castles	2006	151 Km	68,000	8,100	£3,300,000	53
Hadrian's Cycleway	2006	234 Km	160,242	7,500	£6,500,000	105
Pennine Cycleway	2006	184 Km	39,182	2,100	£1,800,000	27
Way of the Roses	2012	274 Km	131,000	7,000	£3,000,000	60

Tourism Spend and Route Usage on Key Tourist Routes in the UK

The UK cycle tourism market has been estimated to be worth over £1 billion¹. Much of this tourism takes place on the National Cycle Network (NCN), often on long distance routes such as the C2C and the Way of the Roses, but also on shorter leisure rides and day trips from home or a holiday base. Cycle tourism benefits local economies through accommodation, retail, food, transport and parking.

TOURIST AND LEISURE CYCLIST SPEND

Analysis of survey data from 22 tourist sites² in the UK provide a range of values for the typical spend per head of leisure cycling and cycle tourism on the NCN.

	Average spend per head (range)
Leisure	£ 7.06 - £15.97
Tourist	£20.03 - £27.66

Average spend per head leisure and tourist cycling from 22 sites on the National Cycle Network



Overall, the NCN contributes over **£650 million** to the economy each year through leisure and tourist cycling

Sector	Home Based	Tourist Based
Accommodation		46%
Food and Drink	74%	42%
Retail	2%	2%
Car Costs	12%	2%
Cycle Costs	3%	2%
Public Transport	3%	3%
Other	6%	3%

Research has shown that this spending is spread across a range of different types of business³. Unsurprisingly, the majority of spending is on accommodation, food and drink. However, a substantial proportion of spending by home based leisure cyclists is on car costs. This could suggest that people will often travel by car to reach a particular cycle route rather than cycle from their front door.

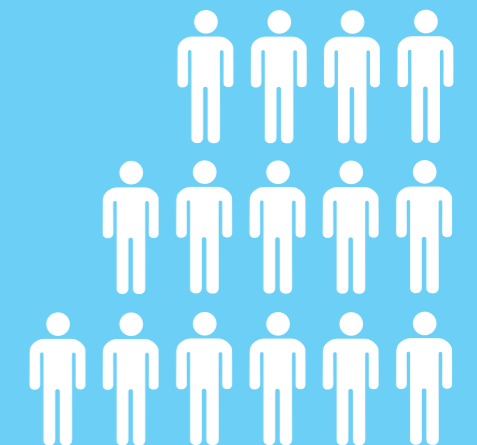
ESTIMATING LEISURE AND TOURIST CYCLE SPEND ON THE NCN

In 2014, 184 million cycle trips on the NCN (53% of the total) were for either leisure purposes or from a holiday base. Assuming that 50% of these trips saw the minimum spend per head calculated above (Table 2), we estimate that leisure and tourist cycling on the NCN contributes £652 million to the economy each year.

Using this value, we estimate that over 15,000 FTE jobs are directly and indirectly supported by this spend. The table shows these jobs split by business type.

Sector	FTE jobs created and supported
Accommodation	1,276
Food and Drink	10,667
Retail	314
Car Costs	1,516
Cycle Costs	433
Public Transport	525
Other	530
TOTAL	15,262

Table 4: FTE jobs supported by leisure and tourist cycling on the NCN by business type.



15,000+
Full Time Equivalent jobs supported by the National Cycle Network



¹ Sky and British Cycling. The 'Olympic Cycling Effect', 2012. Available from: www.corporate.sky.com/documents/pdf/publications/olympic_cycling_effect
² On the NCN and the Valleys Cycle Network
³ University of Central Lancashire and Sustrans (2007) The economic impact of cycle tourism in North East England

CASE STUDY

WALES COAST PATH



The Wales Coast Path was opened in 2012 and stretches along the entire coastline of Wales, some 870 miles/1,400 km.

In the most recent economic survey of path users, it was estimated that there were over 43 million visits to the Welsh coast for walking, most of which involved walking on the WCP. Net expenditure by adults on these trips was over £400 million.

Using the Input Output model the indirect impacts of this net expenditure (or the knock on effect) was estimated as over £540 million of additional output in the Welsh economy or over £271 million of gross value added to the economy.

And its not just traditional tourism businesses benefiting. These impacts are being felt in other areas such as the transport and communications sector with an additional £31 million GVA, and a similar level of impact felt in the financial sector.



CASE STUDY

SOUTH WEST COAST PATH



The South West Coast Path was opened in 1978 and runs for 630 miles/1,014 km from Minehead in Somerset right round the Cornwall and Devon coastlines to Poole Harbour in Dorset.

Over 8.7 million people used the path between 2010 and 2014 and in 2016 it was estimated that visitor expenditure by people using the path increased to over £500 million, sustaining 11,193 full time equivalent jobs. In their 2012 results these figures were broken down by county below:

When faced with these sorts of figures, the £1000 per year per mile to keep the path open, safe and clearly signed looks like a very good investment !

SWCP users summary 2012	Cornwall	Devon	Dorset	Somerset	TOTAL
Total SWCP users	2,254,947	3,216,259	2,738,959	380,532	8,590,698
Total SWCP users spend	£172,683,102	£157,402,419	£94,504,846	£11,592,751	£436,183,118
Total business turnover supported by SWCP activity	£250,934,000	£227,411,000	£131,191,000	£13,731,000	£623,267,000
Associated employment (FTE's) related to user spend	4,129	3,514	1,924	203	9,771
Estimated GVA	£140,719,000	£127,752,000	£73,527,000	£7,647,000	£349,645,000

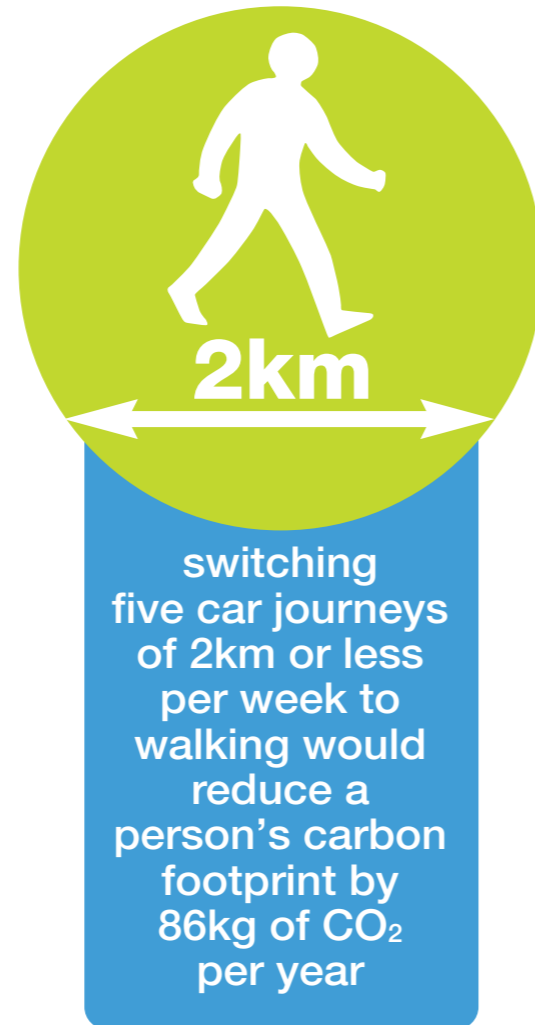
Walking and cycling also fosters a greater awareness and appreciation of our natural environment leading to further behavior change.



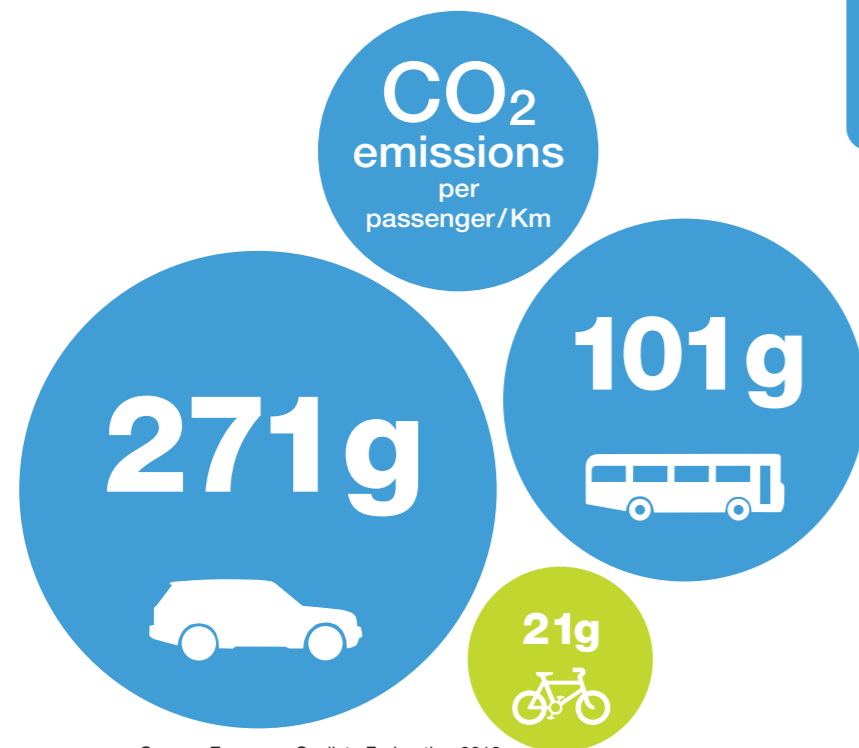
ENVIRONMENTAL BENEFITS OF WALKING AND CYCLING

Increasing the number of people walking and cycling will also lead to a number of environmental benefits including reduced traffic congestion, air pollution and noise. There is strong evidence to show the high environmental impact of short journeys such as travel to work, shops, schools and leisure. If a proportion of these car trips can be replaced with walking and cycling then there will be significant environmental improvements in local areas.

Of the 1.9 billion miles travelled on the National Cycle Network in 2017, 437 million miles could have been made using a car instead, providing a decongestion benefit, that is the result of quicker journey times due to less cars on the road, of £87.7 million.



Source: Potter 2004



Source: European Cyclists Federation 2013

CASE STUDY

GREENER GREENWAYS SUSTRANS



Sustrans' Greener Greenways project transformed 280km of traffic-free cycle routes for people and wildlife. The 3½ year pilot project, funded by the Esmée Fairburn Foundation, began in May 2013 and involved routes in Yorkshire and the Humber, the North West, the Midlands, and across Wales. It revolutionised the way Sustrans' maintenance teams operate, ensuring their work enhances the biodiversity of Sustrans routes as well as providing a safe, attractive and welcoming environment for path users.



An assessment of the outcomes of the project, produced in December 2016, noted that overall Greener Greenways had noticeably improved biodiversity and enabled users to learn about nature on route, with a 65 percentage point increase in 2016 in users who agreed their Greenway is 'rich and varied in wildlife'. There was also a 60 percentage point increase in users who agreed they 'learn about nature' on their Greenway.

Over 380 people became Wildlife Champions over the course of the project. These volunteers were trained in the latest conservation techniques as well as learning how to identify wildlife and match their work to their local habitats and species.

