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An introduction to the benefits of a w developed monitoring process

Cycling Without Borders

Conference

19th September 2014

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Sustrans Research and Monitoring U

Team of 30 - data collection experts

Monitor, evaluate and report on projects in community, universities, workplaces, schools, stations

Research and analysis for projects. Responsible for economic models in UK e.g. Tourism Model, WebTAG, HEAT, Carbon Model

Manage cycle counters and surveys on the National Cycle Network

Range of projects in London, Wales, Northern Ireland, and Scotland.

Monitor, evaluate and report on Government funded projects such as Cycle Safety Fund

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EXAMPLE - Hands Up Scotland:

Established in it is the largest national survey to look at travel to school

RMU are responsible for overall collation, analysis and reporting

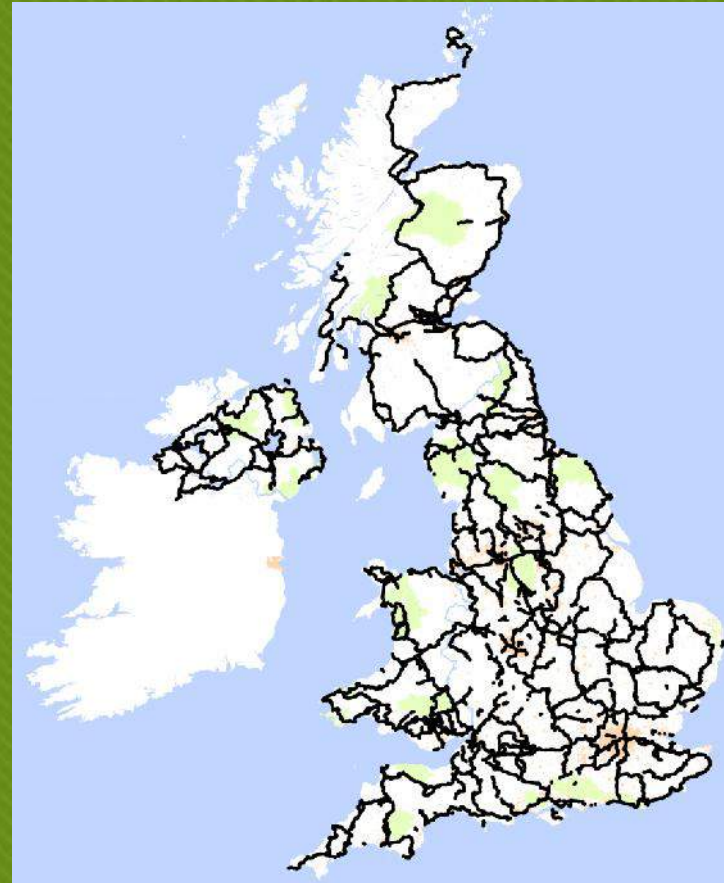Parliamentary Order passed designating Sustrans as Official Statistics Providers on 1st June 2012.

The Hands Up Scotland 2014 survey was between 8th and 12th September 2014 € with results due to be published in May 2015.

National Cycle Network monitoring

1995

2015

Millions of people on the move

Usage and benefits of the National Cycle Network in 2013

7%
50 million more
journeys m...
and bike in 2...

Trends in usage

Usage of the National Cycle Net...

Existing routes saw a **3%** increase...

Scotland usage up by 7...
an increase of **7%**

England usage up...
an increase of **7%**

Northern Ireland usage up by **1 million,**
an increase of **4%**

Wales usage up by **4 million,**
an increase of **7%**

Fit for life

Physical inactivity is a growing problem. As a recently published report from the All-Party Commission on Physical Activity confirms "in all human history, we have never been so inactive. ... we have simply stopped moving".

As an ever growing number of health experts are warning us, sitting is the new enemy. It's as bad as smoking on the effect it has on our health and well being. For our children it could mean a shorter life expectancy than their parents.

Being able to get about by foot and bike changes all this. Users of the Network are physically active, and the benefit to our health, calculated using the World Health Organisation's HEAT tool, is £277 million for cyclists and £526 million for pedestrians.

Health benefits

£526 million

£277 million

Three quarters of users say that the Network increases their regular physical activity, and nearly half of users are achieving their recommended levels of physical activity.

Users say that the Network has increased their levels of physical activity

75%

Around **9 in 10** users over 65 get enjoyment from using the Network

Children made over 110 million active, healthy trips on the Network, 15% of the total, with 27 million of those to and from school, 10 million more than last year.

A third (33%) of users of the Network are over 55, and usage has increased by people over 65. The rate of growth in the number of pedestrian trips made by users over 65 (9%) was greater than the rate of growth in the overall number of pedestrian trips across the Network (7%).

96% of over 65s say they use the Network to get exercise, and around 9 in 10 get enjoyment from using it, an important part of mental well being.

Over half of users over 65 walking say they got 2.5 hours (the recommended weekly minimum) or more of exercise a week, but the less active are also benefiting - nearly one in three of over 65s are achieving up to an hour a week.

The majority of cyclists over 65 are men, but 16% are women, and 7% of trips in this age group were made by those now or returning to cycling. 90% of pedalling pensioners feel happier, and nearly all cyclists in this age group feel fitter, with 77% saying it increases their levels of physical activity.

Over half of users over 65 walking say they get **2.5 hours** exercise a week

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14,500 miles of network across the UK

7% increase
50 million more journeys made by foot and bike in 2013

Over **£1** billion
in health benefits,*
potential savings in fuel and carbon
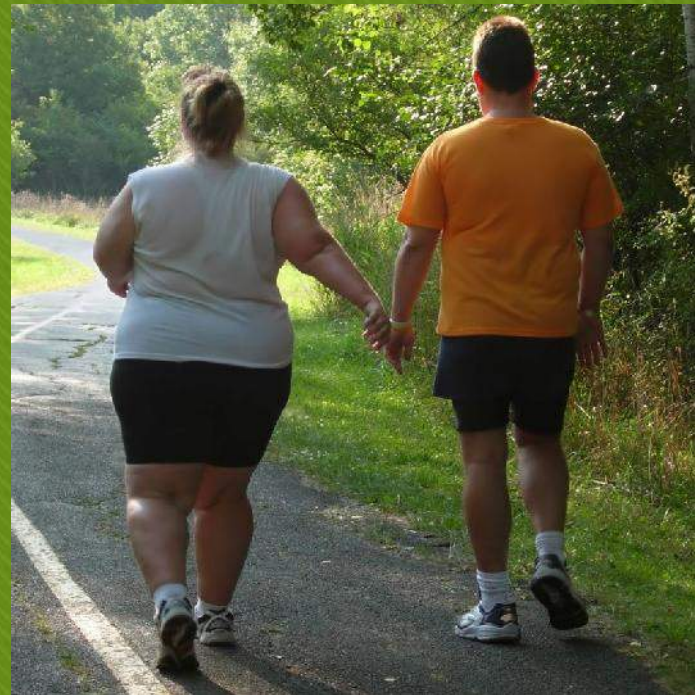
*measured using the HEAT tool

75% of users
say that the Network has increased their levels of physical activity

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Improving health

Reducing physical inactivity by just 1% a year over a five-year period would save the UK economy just under

- 1.2bn

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Tackling obesity

Obesity related
illnesses cost the NHS
- 4.2 billion in 2007

Improving safety

Vulnerable road user casualties have increased each year since 1996

Tackling climate change

In 2013:

67% of all journeys were less than 5 miles

64% of all trips were made by car

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Engaging with children and young peop[le]

, Working with over 500,000 young people

, 1.1 million journeys to school by bike
  or scooter in just two weeks.

, Encouraging children to investigate their
  local area and campaign for change

27%
of children regularly cycling
to school where there is a
Sustrans officer working.

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Improving streets

Engage local people in a process to re-design their streets, neighbourhoods and urban spaces

Economic benefits

12.7 jobs from every £1 million investment

131 million days lost to sickness or injury in 2011

£11 billion annual cost of urban congestion in England

£30 million every year generated by long distance cycle routes

+20% to **40%** increase in shop footfall in walkable street locations

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Transforming local

The benefits of enabling people to w
and cycle for everyday journeys

LOTTERY FUNDED

Creating a profound
and lasting **legacy**

42%
increase
in trips
by foot

1.6 million
short car
trips saved
in a year

£781 million
is the cumulative
benefit over
30 years

53% increase in
trips by bike

6.3:1
is the benefit to
cost ratio (using
the Department for
Transport's appraisal
framework)

4.4 million
people live close
to a scheme

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How investment in walking and cycling leads to **healthier, happier communities**

Roads, rivers and railways create barriers which prevent people from making everyday journeys by foot or bike and cut communities off from each other.

We overcome these barriers by building bridges and crossings, giving people safe and convenient access to workplaces, schools and shops as well as each other. For our 84 schemes finished in 2013, there are an average of 20 schools, 23,000 households and 53,000 people within a mile of each.

More convenient and safe walking and cycling routes lead to more people walking and cycling. So the use of cars decreases.

People enjoy better health, and a better environment and economy due to less car use and more people walking and cycling for their everyday journeys. Local businesses prosper too. This leads to more integrated, sociable communities. The new networks, for example, are reducing car journeys by enabling people to leave their cars behind, generating over £19 million of benefits through reduced congestion, over 30 years.

We evidence this work and use it to influence and secure more funding. This leads to more investment in better walking and cycling routes, and means we can create more vital links, and overcome even more barriers.

A virtuous circle

4.4 million
4.4 million people live within one mile of a new scheme

53%
53% increase in trips by bike
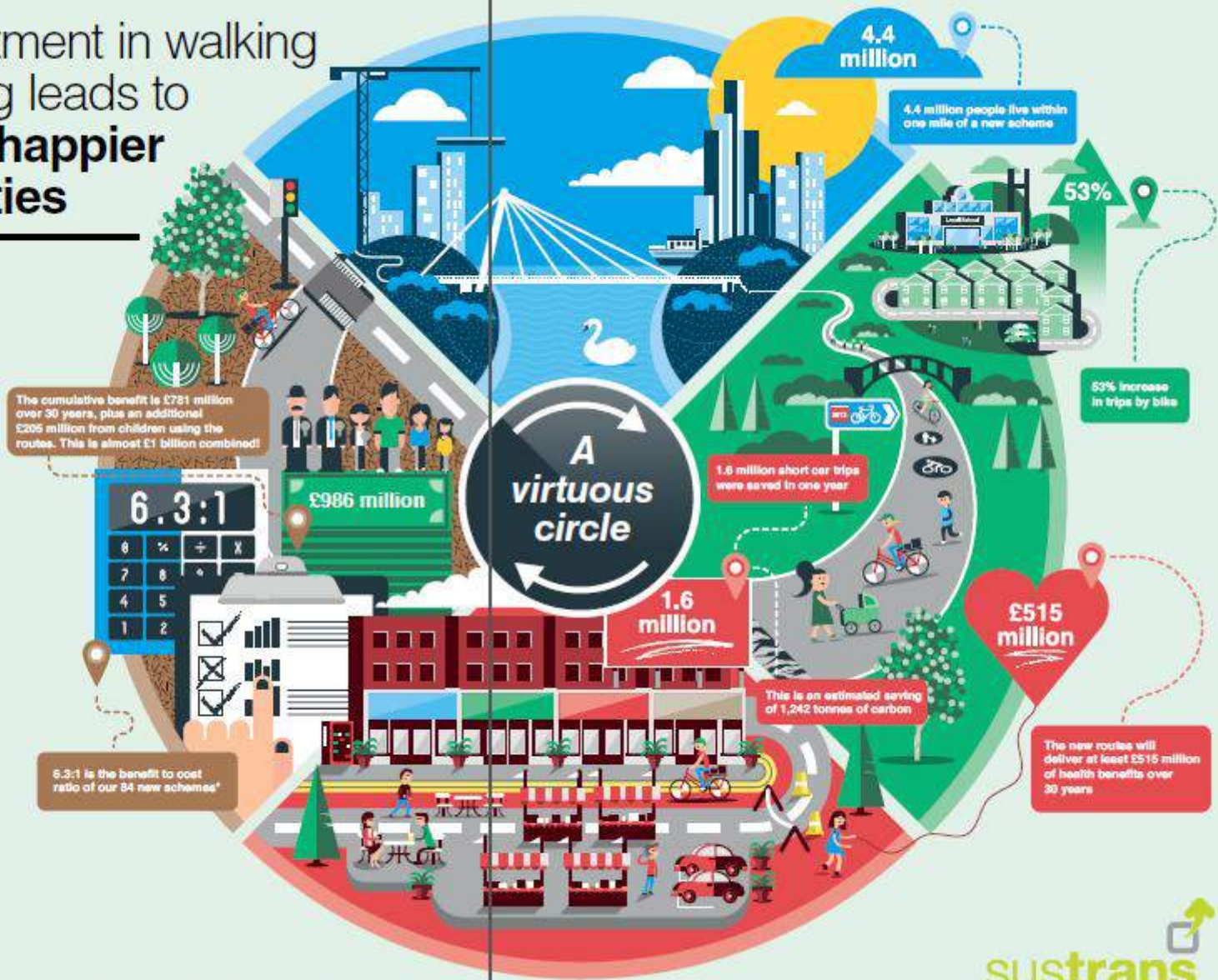
The cumulative benefit is £781 million over 30 years, plus an additional £205 million from children using the routes. This is almost £1 billion combined!

£986 million

6.3:1
6.3:1 is the benefit to cost ratio of our 84 new schemes*

1.6 million short car trips were saved in one year

1.6 million

This is an estimated saving of 1,242 tonnes of carbon

£515 million
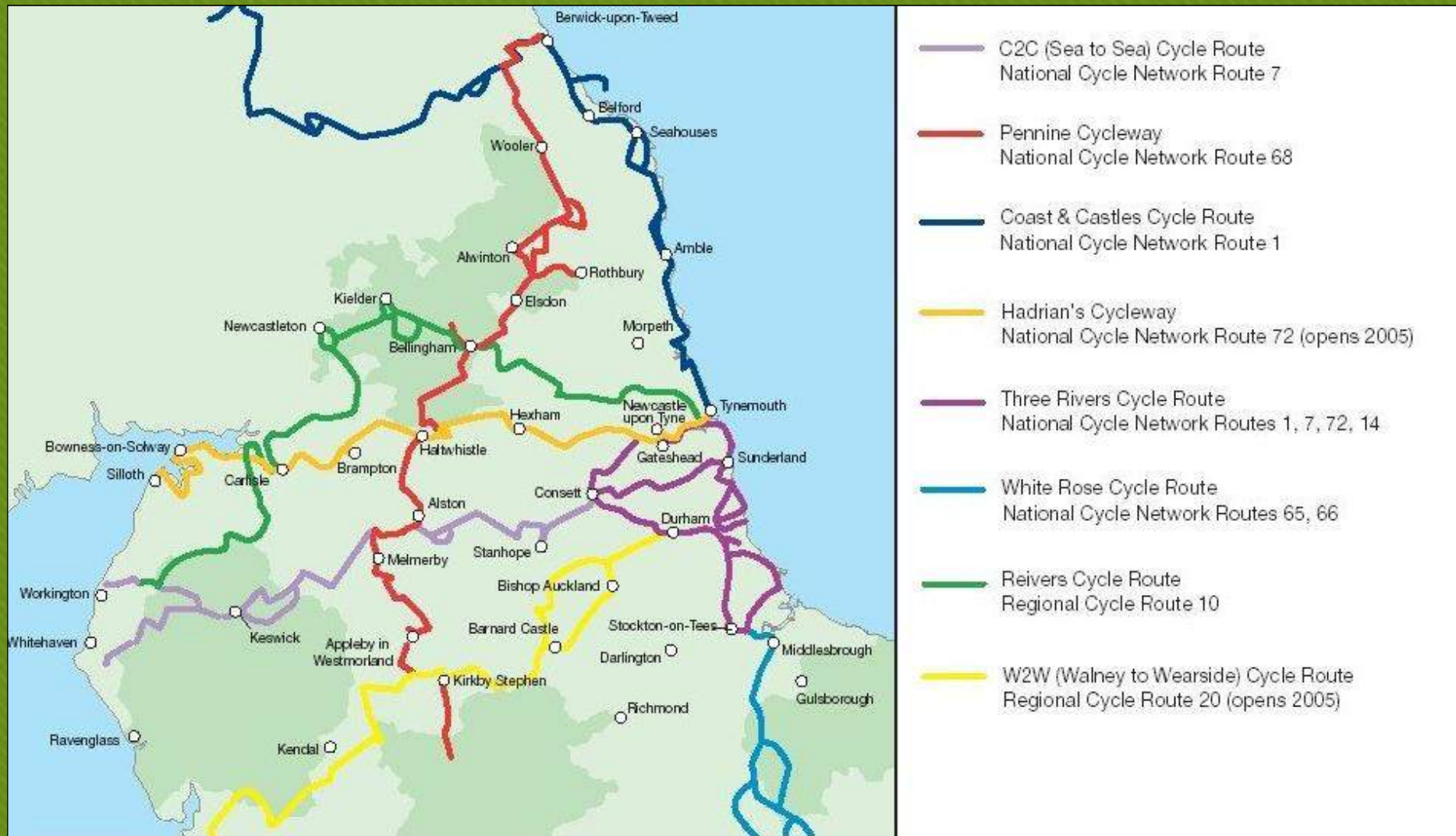The new routes will deliver at least £515 million of health benefits over 30 years

Transforming local travel

* Using the Department for Transport's appraisal framework

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Cycle Tourism and Leisure Spend Model

TheModel helps us estimate€

,How much do tourists spend?

,How much do day visitors spend?

,Where do they spend?

,How can a local economy benefit from cycling tourism?

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Cycle Tourism and Leisure Spend Model

Developed by Sustrans and University of Central Lancashire

Enables us to estimate economic impact of leisure routes

Model uses information on the number of tourist groups using a cycle route and the characteristics of the group

Inputs required are € average trip duration; average group size; percentage of tourist users; percentage of leisure users; total annual usage.

This information comes from route user intercept surveys or similar sources

Model allows us to estimate total amount spent by home-based users and by tourist users, average spend per head, and spend in different sectors (accommodation, food and drink etc).

The revenue is converted into an equivalent number of full time jobs we can expect to be supported by that level of expenditure.

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What do you need to know?

Input	Description	Possible Sources
Region	The region in which the route is located	Route information
Annual Usage	The estimated number of cycling trips on the route per year	Manual count/Automatic Cycle Counters
Percentage of recreational users	The percentage of cyclists using the route that using the route for recreational purposes.	Tourism specific route user survey/ Travel diaries
Percentage of Tourist Users	The percentage of cyclists using the route that are staying away from home overnight	Tourism specific route user survey / Travel diaries
Average Trip Duration	The length of cyclists current trip	Standard route user survey/ Travel diaries
Average Group Size	The average size of groups cyclists are travelling in (included solo cyclists)	Standard route user survey/ Travel diaries
Trip type	The type of trip people are completing – short circular, short out and back, day, touring.	Tourism specific route user survey / Travel diaries

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NCN 2013 Tourism   **Sustrans Route User Survey**

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Survey Site Number:

Interview Number:

Location:

Date (DD/MM/YY)

Time interviewed started:

Interviewer initials:

Day Type? (Select one choice only)
Weekday ☐   Weekend ☐   Bank Holiday ☐

School holiday or term time? (Select one choice only)
School Holidays ☐   Term Time ☐

Q1 Activity undertaken? (Select one choice only)
Walking ☐   Wheelchair Use ☐
Cycling ☐   Roller Skating/Blading ☐
Running/Jogging ☐   Horse Riding ☐
Dog Walking ☐   Other ☐

Q2 Number of people travelling in group? (including respondent)
Adults _____
Children _____

ABOUT YOUR CURRENT JOURNEY

Q3 Are you on a recreational or touring trip OR are you travelling to a specific destination for a particular purpose (select one option only)
Recreational or touring (go to Q5) ☐
Particular purpose (go to Q4) ☐

Q4 What is the purpose of your current journey?
Commuting (getting to/from work) ☐
Recreation (including dog walking) ☐
In course of work ☐
Education ☐
Shopping ☐
Personal business ☐
Visiting friends or family ☐
Social/entertainment ☐
Getting to/from holiday base ☐
Escorting to school ☐
Other escort ☐
Other _____

If you selected 'Getting to/from holiday base' as your journey purpose in Q4, please answer Q5-8. If not, please go to Q9a.

Q5 How would you describe your cycle/walking trip today? (select one option only)
Short, circular recreational trip (less than 3 hours) ☐
Short, out and back recreational trip (less than 3 hours) ☐
Day ride/walk (a trip of more than 3 hours duration) ☐
Part of a cycle/walking holiday - staying at one location ☐
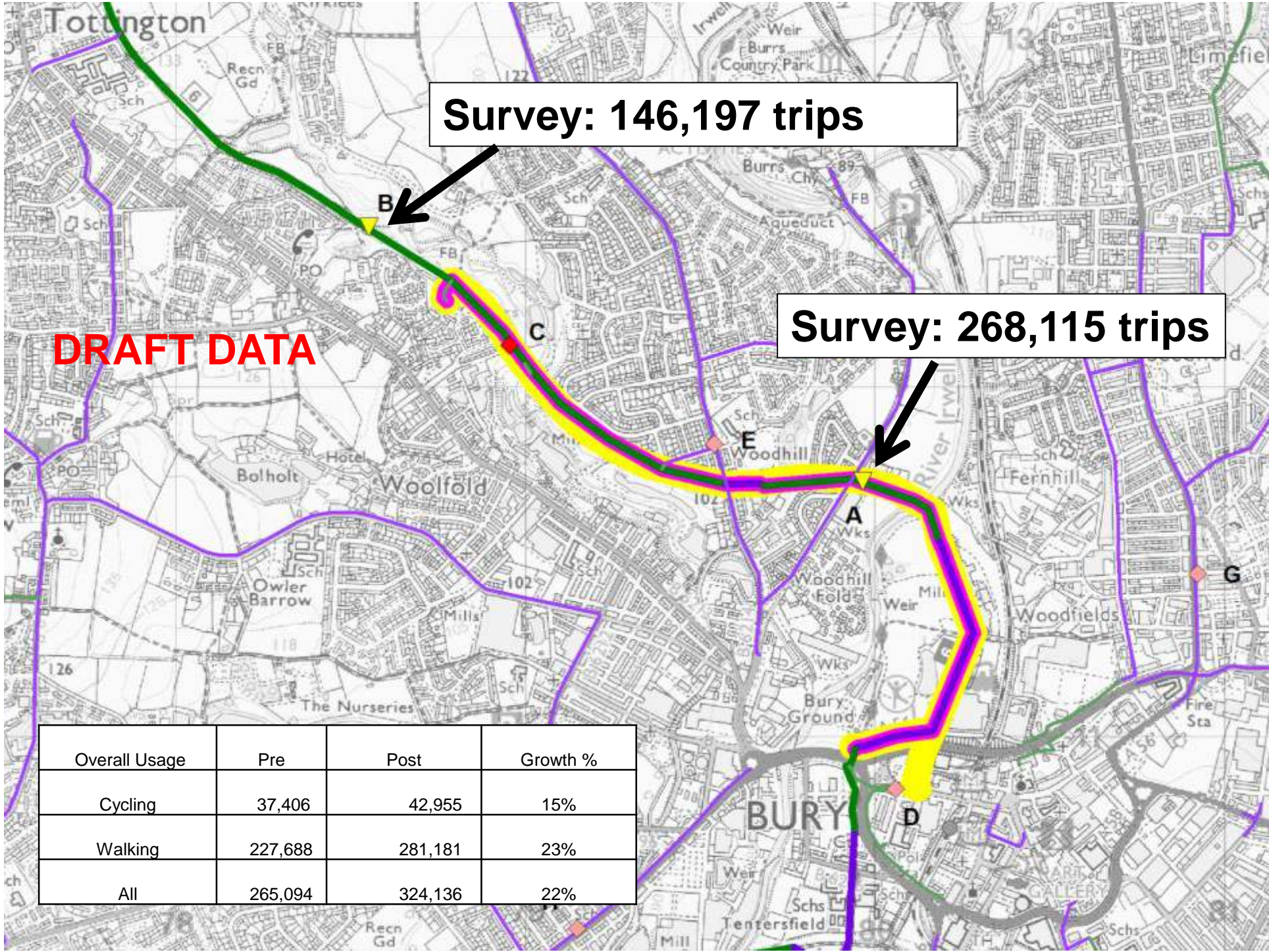Part of a cycle/walking holiday - staying at multiple locations ☐

Q6 Did you start your trip today from home or holiday accomodation? (Select one option only)
Home ☐
Holiday base ☐
Other (please write in) _____

Q7 If starting from a holiday base, how long is your walking/cycling holiday? (please write in)
Number of nights _____

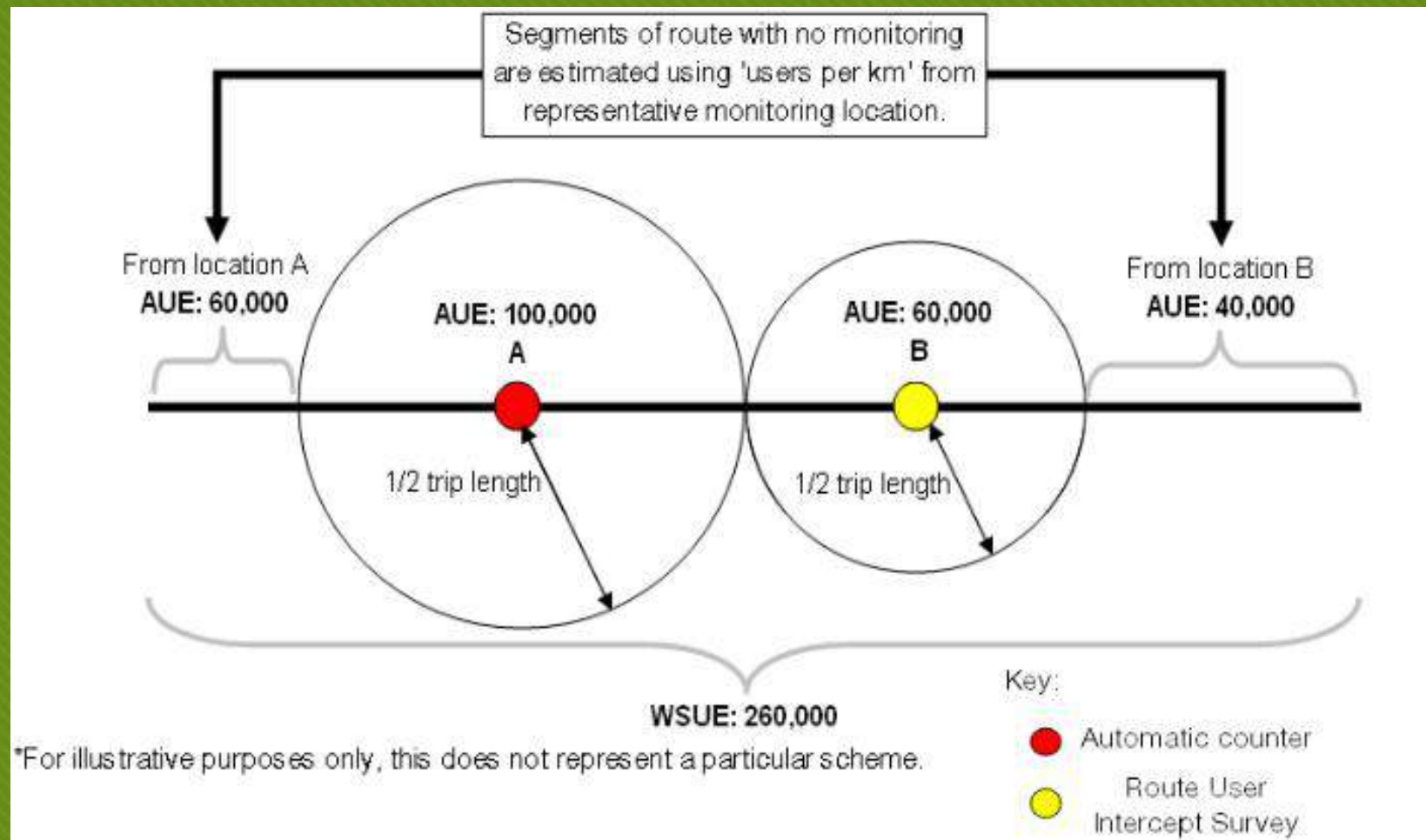**Q8 If possible, could you provide a rough estimate of how much you are likely to spend on this trip, for your immediate party as a whole?**
£ _____

Q9a Full postcode of journey starting point OR city/town/village name

Q9b Full postcode of journey ending point OR city/town/village name

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Survey: 146,197 trips

Survey: 268,115 trips

DRAFT DATA

Overall Usage	Pre	Post	Growth %
Cycling	37,406	42,955	15%
Walking	227,688	281,181	23%
All	265,094	324,136	22%

Estimating whole scheme usage

Tourism Model Patterns

Observations show tourists spend more

Observed relationship between average spend per head and % of tourist users
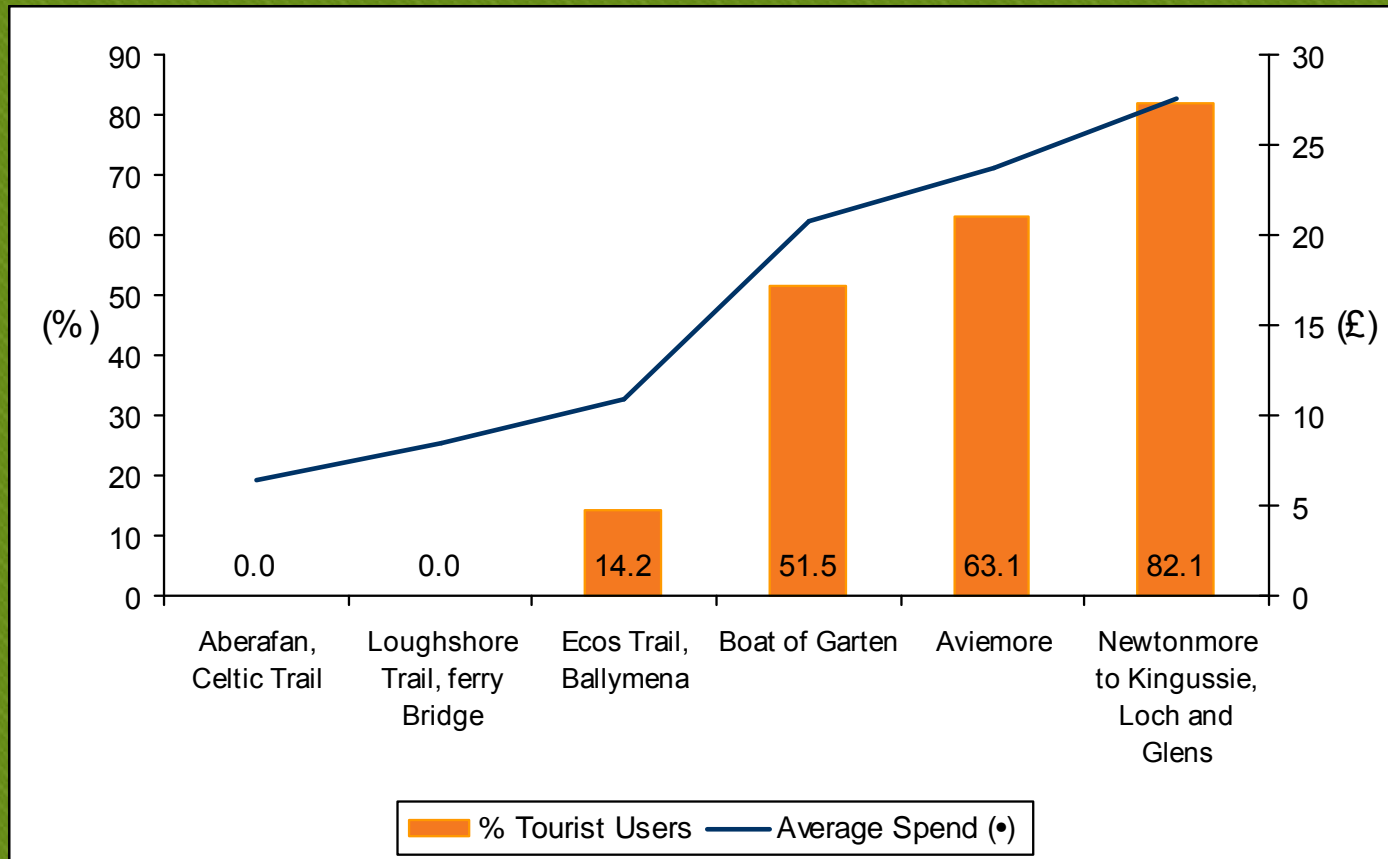
Tourism Case Studies

Headline findings Way of the Roses

Way of the Roses (2012)

, 130,000 leisure cycle trips

, 8,000 end-to-end users

, • 3million to local economy

, 60 FTE jobs

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Headline findings North East routes

Route	Year	Distance (km)	Cycle trips	(of which end to end)	Total yearly expenditure	Jobs supported
C2C	2006	287	241,051	14,000	•10,700,000	173
Coast and castles	2006	151	68,000	8,100	•3,300,000	53
Hadrian's Cycleway	2006	234	160,242	7,500	•6,500,000	105
Pennine Cycleway	2006	184	39,182	2,100	•1,800,000	28

North East Cycle tourism

,302,000 cycle trips

,•9.6million to NE economy

Route	Year	Distance (km)	Cycle trips	Total yearly expenditure	Jobs supported
Celtic Trail	2008	734	1,500,000	•54,000,000	1,002
Taff Trail	2008	97	628,000	•21,000,000	367

Celtic and Taff Trails

, •75 million to South Wales economy

, 1,399 FTE jobs

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Headline findings Scotland

Site	Spend per head		Spend per year		Total spend per year	FTE roles
	Home based	Tourist	Home based	Tourist		
Callander-Kilmahog, Stirling	•13.28	•22.81	•195,225	•107,535	•302,760	7.56
Bo'ness-Blackness, West Lothian	•11.69	•0.00	•12,178	•0	•12,178	0.31
Laggan Locks, Highlands	•13.72	•25.31	•4,661	•68,863	•73,524	1.86
Linlithgow, West Lothian	•11.04	•23.01	•223,707	•37,221	•260,928	6.48
Deeside Way, Aberdeen	•10.37	•26.42	•163,772	•113,929	•277,701	6.94
Peebles to Innerliethen, Borders	•12.13	•22.46	•391,572	•178,790	•570,362	14.22
Benderloch	•15.97	•21.43	•84,222	•143,175	•227,397	5.71
Dores	•12.31	•24.62	•16,596	•33,069	•49,665	1.25
Loch Creran	•13.56	•20.50	•22,381	•55,928	•78,309	1.97

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The
Cyc...

Oppor...
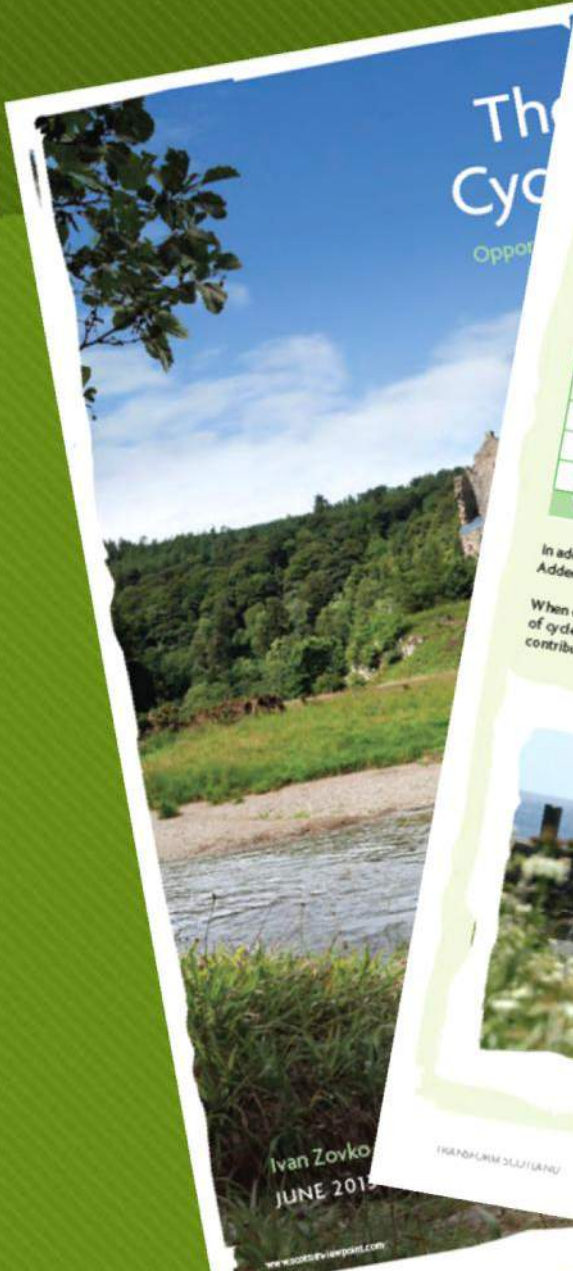
Ivan Zovko

JUNE 201...

www.scottisreviewpoint.com

Executive Summary

BACKGROUND, SC...

This report demonstrates th...
expansion of the sector. Thru...
comprehensive evidence-base...
strategic direction for cycle tou...

FINDINGS

The study identified four major area...
between £17.2 million and £239 millio...
in the table below:

Economic Values
Health benefits
Leisure cycle events
Leisure cycle-related infrastructure
Expenditure by leisure cyclists
Total economic contribution

In addition to the monetised benefits identified abov...
Added (GVA) of Scotland.

When combined with mountain biking, for which separa...
of cycle tourism in Scotland is estimated to be between ...
contribution to GVA of £129m.

Key Recommendations

The report sets out ten recommendations aligned with the 'Priorities for Action' identified in the Scottish Tourism Alliance's
2012 strategy, Tourism Scotland 2020.

STRENGTHENING LEADERSHIP AND COLLABORATION across the sector

1. Strengthen leadership and coordination across the sector
2. Deliver better collaboration between local/regional stakeholders

KNOWING OUR MARKETS

3. Establish more comprehensive monitoring arrangements
4. Focus promotional activities on key market segments
5. Brand Scotland as a top destination for cycle touring
6. Develop key themed areas for leisure cycle tourism

MANAGING THE CUSTOMER JOURNEY

7. Continue the development and marketing of cycle routes
8. Enhance information provision and technology integration

BUILDING SUSTAINABLE TOURISM

9. Continue to support cycle events, and extend this support to smaller events
10. Create a development strategy for the growth of cycle tourism

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Advantages of having data of this sort

, Influence Government policy (e.g. Scotland)

, Strengthen link between cycling and economic growth

, Increase investment in cycling

, Increase investment in leisure and tourism by helping decision makers understand the value of local tourism economy

, Support additional policy work e.g. transport poverty, effectiveness of new routes

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