



Carmarthenshire: The Cycling Hub of Wales

Executive Summary

January 2018

Background

This Cycling Strategy presents a vision designed to make Carmarthenshire 'The Cycling Hub of Wales'.

The aims and objectives of the Strategy have been developed following extensive consultation with a wide range of Stakeholders.

This Strategy strikes a balance between developing and promoting cycling for everyday local journeys and delivering infrastructure and events capable of attracting the world's top cyclists to Carmarthen.

The Active Travel (Wales) Act 2013 provides the foundation upon which this Strategy is developed. The Act requires Local Authorities to promote and develop infrastructure to encourage increased walking and cycling in local communities.

At the beginning of the Active Travel process in 2103 Carmarthenshire had an Existing Route Network covering 100 kilometres across 9 Active Travel towns. In November 2017, as part of the Integrated Network Map submission, Carmarthenshire added an additional 25 kilometres to the Active Travel Network. The 2017 Active Travel submission to Welsh Government contained plans for continuous route and network improvement over a 15 year period.

Carmarthenshire already has a well-established cycling product. The development of the exciting Twyi Valley Cycle Path, the Millennium Coastal Path and the Amman Valley Cycle Path all combine to offer excellent off road cycling opportunities. When opened, the refurbished Velodrome will be one of only two in Wales. While in 2018, Carmarthenshire will host a Stage of Tour of Britain. This will build upon numerous events and club rides already hosted in the County such as the Merlin Ride and Battle on the Beach.

This Strategy plays a key role in supporting the delivery of not only Active Travel but of all aspects of cycling across the County. The Strategy is developed around the following 5 key themes, each of which are designed and tailored to maximise cycling opportunities and to boost participation across all ages and all levels of ability.

Infrastructure & Facilities
Education Training & Development
Events
Tourism
Marketing & Branding



Our Vision: Carmarthenshire, The Cycling Hub of Wales

INFRASTRUCTURE & FACILITIES 1



THEME:
 Invest £10m in the strategic development of key facilities and infrastructure including:

- Ensuring that the Active Travel Network connects people to key destinations
- Continually improving the network by developing quality, safe, comfortable routes
- Developing the Dyffryn Tywi Path connecting Llandeilo and Carmarthen
- Re-furbishing the historic Outdoor Velodrome in Carmarthen
- Constructing the best Closed Circuit Cycling facility in Wales at Pembrey Country Park

EVENTS 3



THEME:
 Co-ordinating a varied range of cycle related events across the County:

- Work closely with Welsh Cycling and Welsh Government
- Support a range of events from local to elite level
- Host a stage of the Tour of Britain
- Host a stage of a grand tour

EDUCATION, DEVELOPMENT & TRAINING 2

FROM	TO	MODE	TIME
TYWI	Llandeilo	2 min	10 min
	Llandeilo	3 min	10 min
	St David's Park	1 hr	
	St David's Park	1 hr	
Llandeilo	TYWI	1 hr 20 min	
	TYWI	1 hr 20 min	
HYDDIN	Pembrey	8 min	25 min
	Pembrey	8 min	25 min
Cydweli	St David's Park	1 hr 27 min	
	St David's Park	1 hr 27 min	
Llandeilo	St David's Park	2 hr 46 min	
	St David's Park	2 hr 46 min	

THEME:
 Improve education, development and training by:

- Giving every child the opportunity to learn to ride a bike
- Supporting Pathways from grassroots to elite level cycling
- Promoting social inclusion

TOURISM 4



THEME:
 Work with Tourism providers to:

- Develop a more co-ordinated product
- Promote Carmarthenshire as the premier cycling destination in Wales
- Work with Visit Wales to increase profile

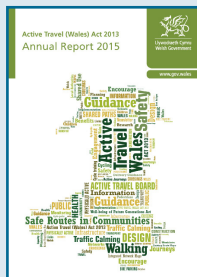
MARKETING & BRANDING 5



THEME:
 Improve Marketing & Branding by:

- Developing a social media campaign to increase brand awareness
- Embracing technology
- Developing a co-ordinated approach to information provision

These themes are supported by the following Welsh Government and Welsh Cycling strategies and initiatives;



WELSH GOVERNMENT
 ACTIVE TRAVEL ACT



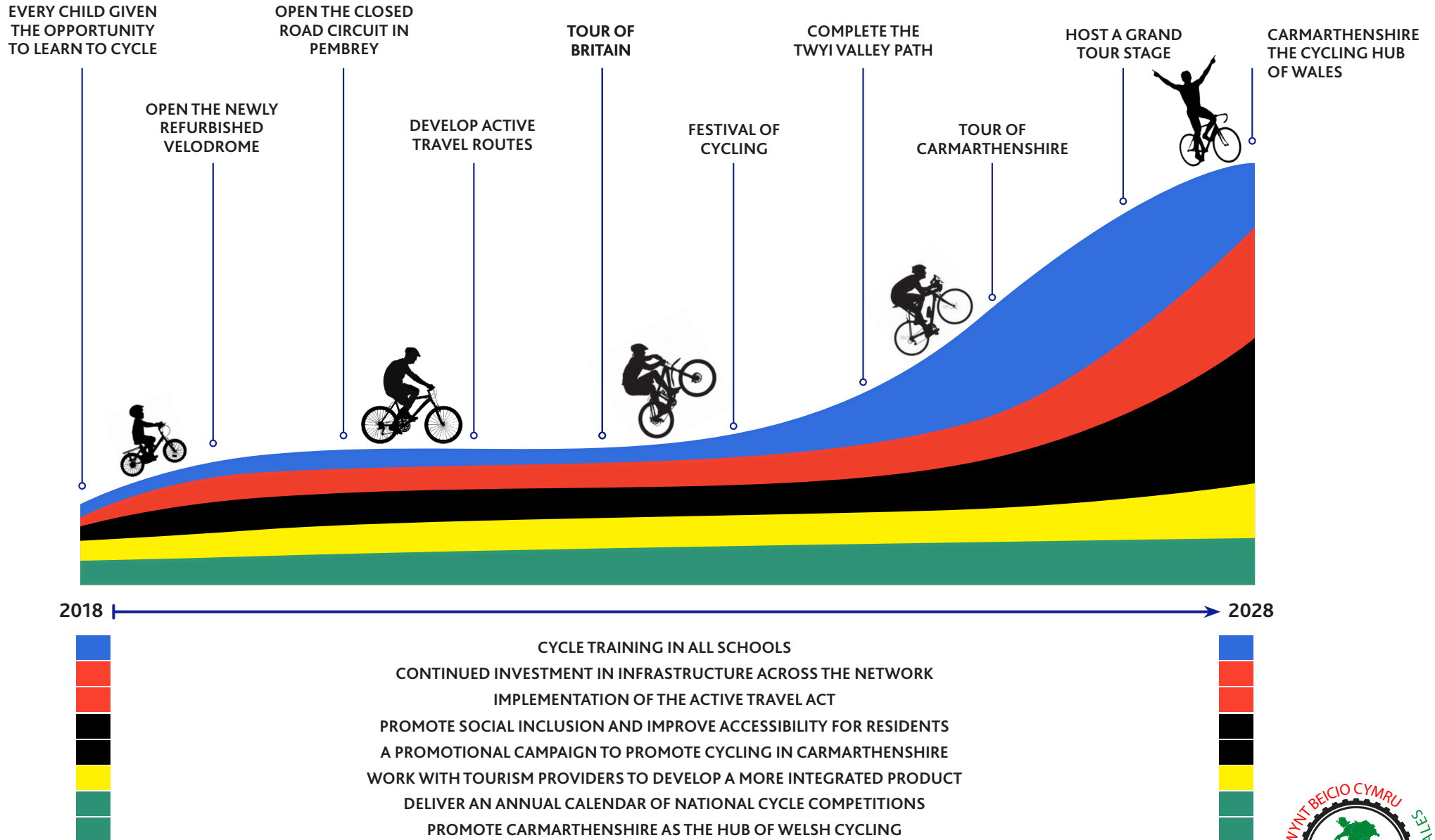
WELL BEING OF FUTURE
 GENERATIONS (WALES) ACT 2015



WELSH CYCLING STRATEGY 2013 - 2020



SWANSEA BAY CITY REGION



Cycling in Carmarthenshire

With an extensive 3,487 kilometre road network, the second longest in Wales, Carmarthenshire has the third highest traffic volume in Wales. With over 80 miles of pristine coastline, and some of the most breath-taking scenery in the UK, Carmarthenshire is well placed at the heart of South Wales. To the East of the County is the industrial centre of Wales and the economic powerhouses of, Cardiff and Swansea. The County is central to the Pembrokeshire Coast National Park to the West, The Gower peninsula to the East, and the Cambrian Mountains and Brecon Beacons National Park to the North and North East.

The county attracted over 3.1 million visitors in 2014. Day trippers increased by 7.4% in 2014 and overnight visitors increased by 2.2% on 2013 levels. This generated over £340m for the local economy.

Carmarthenshire already has a well-established cycling product. The Millennium Coastal Path, Brechfa, Cwm Rhaeadr and Crychan Forest offer world class mountain biking facilities, while every type of road cyclists from the novice to the hard core enthusiast can be catered for on numerous different routes and trails that weave across the Garden of Wales.

In addition there is the soon to be refurbished Velodrome in Carmarthen, is one of only two outdoor velodrome facilities in Wales and is home to the National Track cycling competitions.



In Wales, the Active Travel (Wales) Act 2013 means that Local Authorities are legally bound to plan and provide a comprehensive network of routes so that walking and cycling become the most desirable ways to get around for everyday journeys. This will inevitably lead to an increase in the number of journeys undertaken by foot and bicycle.

Carmarthenshire County Council has been proactive in supporting and developing walking and cycling over recent years complying and promoting the principles of the Active Travel (Wales) Act 2013. However, a step change is required to achieve the aspiration of making Carmarthenshire the number one destination for cycling in Wales.

This Strategy has been developed in partnership with local Cycling Clubs, grass roots participants and schools as well as representatives from Welsh Cycling, Sustrans and the Welsh Government.



Carmarthenshire - The Future

London had the Olympics, Glasgow had the Commonwealth Games, Yorkshire had the Tour de France. Now imagine the whole of Wales has turned pink as Carmarthenshire hosts the Gran Fondo for the Giro D Italia. The Giro is unparalleled as one of the worlds most iconic sporting events. Over 170,000 visitors, contributed over £3 million into the local economy, while a flotilla of television cameras beamed postcard perfect images of Carmarthenshire to a TV audience of over 775 million people.

Winning the Giro is up there as one of the high points of a cyclists career but hosting the event provided Carmarthenshire with prime time advertising opportunities in 174 countries across the world, as racing drama unfolded against a backdrop of stunning coastline and countryside.

Carmarthenshire has transformed itself into 'the hub of Cycling in Wales'. The newly refurbished Velodrome, the Closed Road Circuit at Pembrey, the Tywi Valley Cycle Path and an expanding network of Active Travel routes all combine to offer novices, leisure cyclists and elite riders a growing number of world class cycling opportunities in the Heart of Wales.

The County is criss-crossed by a network of well maintained, direct, well signed cycle routes that connect residential areas with shopping, employment, healthcare and leisure facilities. As a result it is easier than ever to make those short local journeys by foot or on a bicycle. People use Carmarthenshire as a central hub for cycling as they ride north to the Cambrian Mountains, East to the Black Mountains, South to Gower, and West to Pembrokeshire.

The Towy Valley Path, the Millennium Coastal Path and the Amman Valley Cycle Path offer miles and miles of off road cycling. Nationally, Llwybr Dyffryn Tywi is repeatedly highlighted as a shining example of good practise. The route attracts 15,000 day visits per year & 5,000 overnight stays which generates between £860k - £2m per annum for the local economy. In addition it generates between 17-41 full time jobs every year. While the 'Tour of Carmarthenshire' attracts 5,000 riders per annum into the area.

The historic Velodrome in Carmarthen becomes a nationally recognised 'centre of excellence for cycling', hosting Welsh Cycling sessions and National Track competitions. The velodrome has become a hub of activity servicing the whole community in a venue capable of nurturing champions of the future. In addition the closed road circuit at Pembrey provides a traffic free environment for training, for competitive cycling and for recreational rides.

All secondary schools are connected to a safe network of cycle routes, meaning that car use on the school run has plummeted, thereby, making the school gate environment a safer place. As a result of increased activity pupils are fitter, healthier and collision rates have reduced.

Many key employment sites have improved cycling facilities and are connected to an increasing network of cycle routes, resulting in reduced demand for parking spaces and improved access for everyone, especially those without access to a car. Increasingly, bicycles are replacing the car as the vehicle of choice for the commute to work.

The County has become a magnet for cyclists from all across Wales, the UK and beyond. Following years of investment Carmarthenshire now has a cycling infrastructure that is the envy of the world.



The Opportunities

There are huge opportunities for local authorities who want to invest in and promote cycling.

Cycle event hosting could provide an opportunity to highlight Carmarthenshire on a national and international scale as well as assist in growing tourism. For example, for three days in July 2014, 4.8 million people turned out in Yorkshire to watch the Tour De France. It is estimated that 40% of spectators were visitors from outside the area, spending approximately £128 million. 3.5 billion people in 188 different countries watch the Tour every year.

It has been reported that Cumbria received a £4.1m economic boost though holding Stage Two of The Tour of Britain cycle race in September 2013, with Monmouthshire County Council reporting a 12:1 return on investment for every pound spent at the Tour of Britain and the National Road Race Championship. The recent 2016 Welsh Velothon sold out, with 18,000 cyclists paying £70 to enter.

Cycle tourism presents another opportunity, with many areas of the UK targeting the cycle market with niche products to attract visitors. There are already ten accommodation providers listed with 'Holidays by Cycle' in the county of Carmarthenshire. However, there is room to grow and expand this greatly through investment and development of the necessary infrastructure to encourage new businesses to start up and offer a cycle tourism product.

One of the greatest opportunities in growing cycling exists amongst the young. Enabling children in Carmarthenshire to learn to ride a bike will help develop active travel habits that will continue into adulthood and ensure future generations make more sustainable journey choices. This will also aid in addressing the issue of obesity which is often linked to inactivity, entrenching positive active travel habits from an early age. Investment now in the tools needed to develop cycling amongst young people could reap benefits for the future within Carmarthenshire.

Carmarthenshire has the natural resources, landscape and base infrastructure that with investment could be utilised to host major cycling events, accommodate a healthy cycle tourism industry and achieve record cycling numbers from the very young to the avid mountain bike/road bike enthusiast.



The Benefits

According to the Carmarthenshire Local Development Plan (LDP) more than 60% of the UK adult population and 54% of Carmarthenshire's population is overweight or obese.

Individuals in Carmarthenshire who rate their general state of health as good rests at 62.4% and falls below the national average of 65.1%. The population percentage of Carmarthenshire with a long-term limiting illness is particularly elevated above the national average of 23.3% at a rate of 35.6%.

A Cycle England report reveals that even modest levels of cycling can deliver life changing benefits to participants. It is thought that 3 trips per week, of less than 4km, can have significant health benefits.

Cycle tourism can also have major economic benefits. A 2013 report outlined that the total value of cycle tourism by residents and visitors, both touring and leisure cycling in Scotland is up to £239m per year.

Mountain biking tourism currently contributes £19m a year to the Welsh Economy and Brechfa Mountain Biking Centre in Carmarthenshire is currently considered one of the most popular mountain biking destinations in Wales.

Evidence shows that physical activity such as cycling is correlated to educational attainment. Cycling increased from 33% in 2013 to 43% in 2015 in Carmarthenshire schools, according to the school sports survey.

Cycling may not be for you, but with over 2.5 million people in the UK riding a bike once a week, you will know someone who regularly participates in the UK's third most popular sport.



Velothon Wales was a closed-road event held in May 2016, 18,000 cyclists paid £70 to participate. The 2015 Velothon Wales saw a total expenditure in Wales of £2.77m (£2.06m by participants and their supporters, £0.71m by the organisers).

The total expenditure from outside of Wales was £1.03m, the sum of the spending in Wales by visitors (£0.96m) and organisers (£0.71m) minus the amount of event revenue that originated from Wales (£0.64m).

LOCATION OF SPENDING BY PARTICIPANTS/ SUPPORTERS	LOCALS	VISITORS	OVERALL
CARDIFF	£0.85m	£0.79m	£1.65m
NEWPORT	£0.04m	£0.05m	£0.09m
CAERPHILLY	£0.04m	£0.02m	£0.06m
MONMOUTHSHIRE	£0.02m	£0.02m	£0.04m
TORFAEN	£0.01m	£0.00m	£0.01m
REST OF WALES	£0.14m	£0.08m	£0.22m
OVERALL	£1.10m	£0.96m	£2.06m

Monmouthshire County Council (MCC) hosted a stage of the Tour of Britain and the National Road Cycling Championships in 2014. The cost to stage these events to Monmouthshire was £176,362. The ROI was estimated as £12 visitor expenditure in the country for every pound spent by the Council, with each FTE job created costing the Council £6,532. The ROI figures are in addition to the value of other identified benefits generated (e.g. the improved profile and reputation of the destination and the Council with 56% of spectators recognising MCC as a sponsor of Stage 3 of the Tour of Britain).

The net employment and net GVA figures for both events can be estimated as follows:

ESTIMATED ECONOMIC IMPACT IN MONMOUTHSHIRE	NATIONAL ROAD CYCLING CHAMPIONSHIPS 2014	STAGE 3 TOUR OF BRITAIN 2014
NET EXPENDITURE (BY VISITORS)	£1,404,557	£715,283
NET GVA	£726,156	£369,801
FTE EMPLOYMENT	18	9

Action Plan

THEMES	INFRASTRUCTURE & FACILITIES	EDUCATION, DEVELOPMENT & TRAINING	EVENTS	TOURISM	MARKETING & BRANDING
OBJECTIVES	INVEST £10M IN THE STRATEGIC DEVELOPMENTS OF KEY FACILITIES AND INFRASTRUCTURE BY;	IMPROVE EDUCATION, DEVELOPMENT AND TRAINING BY;	CO-ORDINATE A VARIED RANGE OF CYCLE RELATED EVENTS ACROSS THE COUNTY;	WORK WITH TOURISM PROVIDERS TO;	IMPROVE MARKETING & BRANDING BY;
HIGH LEVEL SUPPORTING ACTIONS	Completing the Velodrome refurbishment	Giving every child the opportunity to learn to ride a bike by ensuring that Cycle Training is offered in all schools	Host Stage of the Tour of Britain	Develop a more co-ordinated product by working with Visit Wales to increase the profile of cycling in Carmarthen	Developing a promotional campaign centered on 'Making Carmarthenshire the Hub of Welsh Cycling'
	Delivering the best Closed Circuit Cycling facility in Wales, at Pembrey	Promoting social inclusion and access to employment through improved partnership working by developing an accessible network of routes	Work with Sport Wales and Welsh Cycling to develop an annual calendar of regional sportives and events	Work with accommodation providers to promote the development of cycling facilities for visitors	Developing a logo and a social media campaign to promote Carmarthenshire as the premier destination for Cycling in Wales
	Providing a traffic free route connecting Llandeilo and Carmarthen along the Dyffryn Tywi Path	Supporting Pathways from grassroots to elite level cycling by supporting the Pathways for Developing Leisure Cycling; <ul style="list-style-type: none"> • Ownership • Coaching • Leisure Rides 	Host National Events across all cycling disciplines; <ul style="list-style-type: none"> • National Road Race Championship • National Cyclo-Cross Championship • Welsh MTB Cross Country Championship 	Develop a cycle network to maximise the opportunities offered by the natural landscape in Carmarthenshire	Increasing the profile of cycling on www.carmarthenshire.gov.uk and www.discovercarmarthenshire.com and other appropriate websites and social media platforms
	Providing a programme of continuous improvement in-line with Active Travel Guidance to deliver safe, comfortable routes that connect people to key destinations	Collaborating with existing clubs, user forums and the general public to support the Pathways for Developing Cycling at Grassroots Level; <ul style="list-style-type: none"> • Local Decisions • Quality Education • Committed Workforce • Appropriate Facilities • Thriving Clubs 	Host of Festival of Cycling to include events for cyclists of all ages and abilities	Work with tourism providers to help deliver a series of cycling-based package holidays	Embracing technology to; <ul style="list-style-type: none"> • Improve information distribution • Improve wayfinding & mapping • Distribute promotional campaigns • Engage users & increase awareness
	Providing appropriate levels of cycling parking and signage across the County	Working with Sports Wales and Welsh Cycling to develop and deliver their objectives for increasing activity levels through participation in cycling events	Host a Stage of a Grand Tour	Promote Carmarthenshire as the premier cycling destination in Wales	Developing a co-ordinated approach to information provision across different types of media

Carmarthenshire's Strategic Cycling Group will be established to deliver this strategy, and to develop and promote infrastructure to facilitate the growth of all types of cycling in the County, so that Carmarthenshire becomes the Cycling Hub of Wales:



