Recreational Cycling & Cycle Tourism in Northumberland

Asset Review & Recommendations for Growth

Prepared for Cycle PaD by CycleTRAX & Recreational Tourism Services

June 2013

Making Sure the Experience Matches the Potential and the Promise
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All the resources used in the research for this report are referenced and held on The Cycle PaD website for download, these have un-published urls at www.cyclepad.org.uk so the reader will only be able to access the documents via the links in the report.

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Part 1 – Introduction 1
States the case for valuing and supporting recreational cycling and cycle tourism namely for economic impact, environmental, social and health reasons.

It summarises what cycle tourism is, and explains the method of measuring Northumberland's status with The Cycle Tourism Standards Table.

Part 2 - Economic and Demographic Dynamics of Cycling & Cycle Tourism 5
Is in 2 sections. Section 1 overviews economic and demographic development within Europe, the UK and Northumberland, with a focus on monitoring and data capture. Section 2 has case studies from around the UK and provides a very good snapshot of exemplars within the sector.

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Reviews the current recreational cycling and cycle tourism offer in Northumberland and identifies every aspect of it, ranging from cycle route, businesses, services and events. It's the Who Does What and What Have We Got section!

Part 4 - Infrastructure, Product Development and Bringing the Existing Offer up to Standard 17
Outlines the areas of the cycle tourism offer in Northumberland that must be improved if in 2014 the real-time experience of the current offer is to match the potential and the promise. It also identifies how existing routes and Northumberland’s fine landscape could be used more creatively to develop new products for a dynamic market.

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Context

Cycling is becoming increasingly popular and it is anticipated the visit of the Tour of France to Yorkshire in 2014 will produce an explosion of publicity in the UK and abroad which will raise the profile of cycling to an unprecedented level.

Northumberland Tourism would like to take fullest advantage of this publicity and has decided to make cycling a major thrust for its 2014 marketing campaign to attract many more cyclists to Northumberland for multi night visits and day trips.

The county's landscape and heritage is outstanding and the existing cycle route network provides an excellent basis to attract cycling visitors to Northumberland. The recreational cycling and cycle tourism offer in Northumberland has the potential to be exceptional but it needs a few appropriate interventions and changes to the status quo for this to happen.

Cycle Pad and Associates have been commissioned to evaluate the current offer and make recommendations how it can be improved by means of relatively low cost interventions in order to unlock the economic impact which cycle tourism always brings in its wake.

Northumberland can only take its place in this competitive market place on merit. Our aim is to attain 5* status for our cycling offer and the process to achieve this begins with this report.

This study reviews the current offer and makes recommendations what must be done to bring the offer not just up to standard but to a level that builds on its natural assets. These are its quiet roads, labyrinthine access network, amazing and widely varied scenery, expansive unspoilt landscapes, iconic landmarks and a wide range of heritage connections at every turn. These are the assets which could make Northumberland a magnet for recreational and touring cyclists – all with money to spend in local communities and glowing tales of the warm welcome they received but it will not happen by itself.

The work required to bring the infrastructure up to a consistent standard is not huge or costly but it does need doing commencing as soon as possible for 2014.

Managing the network infrastructure is critical to maintain a quality experience.

Cyclists aren’t a homogenous group of people and the network infrastructure needs to take this into account. Increasingly, both road and off-road cyclists are riding very expensive bikes; they have spending power to match but won’t accept second rate service.

In Northumberland there are:

- 152 cafes and tea rooms in Northumberland are listed on the Cycling Touring Club website
- 79 cycling clubs listed registered with British Cycling that are based in or use Northumberland to ride in.
- 12 cycle hire businesses
- 8 luggage/cyclists/cycle carrier businesses
- 0 cycle tour operators
- 10 qualified cycle guides
- 11 cycle shops
- 20 cycling clubs
- 1 cycling campaign group
The Authors

Cycle PaD was commissioned by Northumberland Tourism to produce this report.

Cycle PaD (Portal and Directory) is a social enterprise that runs as a not for profit business. Supported by The Sustainable Development Fund via Northumberland National Park Authority, the Cycle PaD is an information resource to assist any group, individual, business or public body to get the very most out of cycling. Partners of Cycle PaD include Northumberland Tourism, Northumberland National Park Authority, Northumberland Coast AONB, and North Pennines AONB.

The primary researchers and authors of this project are Ted Liddle of CycleTRAX and Graham Vickers of Recreational Tourism Services (RTS).

Ted Liddle is a sustainable transport consultant with extensive experience in almost all aspects of delivering cycling in both urban and rural settings. Understanding mountain biking, recreational cycling and the dynamics of cycle tourism are key strengths. Specialisms include marketing and promoting cycling, the development of Greenways and cycling for health.

Ted is the originator of some 1,800 miles of mapped and signed cycle routes in the North of England, 24 cycle route map/guides and the author of 2 guidebooks with several more of each in process. www.cycle-link.tedliddle.co.uk

RTS is a tourism based consultancy specialising in cycle tourism. Graham has worked in many parts of the world and has a considerable depth of experience in tourism organisations both at home and abroad. Graham has worked on a business start-up dive centre in India, managed the UK product for the country's largest independent cycle tour operator, established business networks, and facilitated between public and private sector tourism organisations amongst other hands on experience. www.recreationaltourismservices.com

These skills have allowed Cycle TRAX & RTS to appreciate what Northumberland has, and could have in terms of visitor cycle offer.
Methodology, Consultations & Consultation Process

What we did

Initial discussions with Northumberland Tourism identified a key group of potential partners and stakeholders. It was agreed that the list could be infinite and that further potential partners / stakeholders could and would be engaged in post-production of this report. Each potential stakeholder / partner was contacted as high in post as possible with a formal letter of introduction Consultation Letter. This demonstrated the level cycling was considered important enough to address and someone was in post with the responsibility to respond.

A Consultation Questionnaire was compiled that was broken down into 3 sections. Consideration was made to have a traditional questionnaire with only a yes or no response. However, the decision was made that in order for us to evaluate the depth of knowledge and understanding of the subject the consultees have, it was necessary to allow them to provide as broad a response as possible.

As a result the responders’ comments are not tabulated but are shown in this section for reference and the context is absorbed into the report as a whole. A SWOT from the consultation was also compiled.
Over 80 reports and studies were researched for this report which is devoted to the economic and demographic dynamics of cycling and cycle tourism. The starting point is the stark fact a comprehensive and accurate study on cycle tourism and its economic outputs has never taken place anywhere in the North of England which of course includes Northumberland.

To provide a substantiated picture as possible and meet the requirements of this part of the report, the authors have taken an approach that uses data that is currently available, specific case studies from outside Northumberland and their own comprehensive and detailed knowledge of the sector.

**Stages**

11\(^{th}\) April 2013: Formal invitation to all potential partners / stakeholders sent via Jude Leitch at Northumberland Tourism along with a consultation questionnaire. This was e-mailed to each identified partner / stakeholder on one e-mail.

Interim: Informal individual follow-up by Cycle PaD

10\(^{th}\) May 2013: Formal follow up sent by Jude Leitch to all and further individual follow-up to non-responders.

On-going: Cycle PaD and associates have maintained response-related follow-ups.

A full list of consultations and responses can be found [here](#).

**Conclusions**

This consultation process revealed some interesting insights:

- There are relevant post holders in key bodies that have considerable understanding of cycle tourism but clearly do not have the time, funds, remit or capacity to influence the status quo to any meaningful extent
- There is untapped potential to engage national bodies like the National Trust, English Heritage and the YHA to support and promote cycle tourism
- There are others who sit outside relevant bodies who have a useful level of understanding of cycle tourism but no context in which they can contribute it
- Cycle tourism holiday providers and associated business have first-hand knowledge of the status quo for cycle tourism but no context in which to apply it
- Hadrian’s Wall Trust is a major influencer and should determine to engage with a regional approach to improving cycle tourism

The key conclusion is that this report’s primary recommendation to create a suitable Cycle Tourism management mechanism for Northumberland is clearly a priority.
Part 1: Introduction

Cycle tourism began to grow from the first day cycling was invented simply because cycling is such an accessible and enjoyable way to tour an area. Greater distances can be covered compared to walking and yet participants can still enjoy the enlivening feeling of fresh air on their skin, the freedom to explore what’s around the next corner and over the distant horizon and the thrill of discovering new places using their own power.

In the second half of the 1990's it was collectively agreed to develop cycle tourism in Northumberland when the cycle route network was first conceived but only sporadic initiatives have transpired. No overall strategy for cycling and cycle tourism has ever been implemented for the county.

Key partners

All partners involved in the development of Northumberland’s cycling offer should be familiar with the report’s analysis of the Dynamics of Cycle Tourism that impact on cycling.

For the successful delivery of cycle tourism in Northumberland, there must be a co-ordinated pro-active, re-active and consensus input from several key partners:

- Northumberland County Council – Highways, Countryside, Cycling & Tourism
- Northumberland Tourism
- Northumberland National Park Authority
- Northumberland Coastal AONB
- North Pennines AONB
- Kielder Partnership / Forestry Commission
- Hadrian’s Wall Trust
- National Trust
The Cycle Tourism Standards Table
This is used across Europe to rate cycle destinations from 1 to 5 stars. Full Explanation of the Cycle Tourism Standards Table Assessment. A current analysis of Northumberland’s offer using the Standard Table places the county as 2 star. 5 star is what Northumberland’s cycle partners must strive for if Northumberland is to stand out as a competitive cycling destination. To do that, the ‘sleeping giant’ that is cycle tourism in Northumberland must be woken and that needs to be done carefully and strategically by a collective of informed and insightful minds.

Some of the best examples of successful cycle plan implementation can be found:

In the **Scottish Borders**, the 7 Stanes project is now in its seventh year. The seven Forestry Commission sites now average 550,000 day bike visits per year of which 400,000 are to Glentress & Innerleithen bringing £9m into the local economy. As a result, some 3000 new jobs have been created. Ref: www.tourism-intelligence.co.uk

In the **South West of England** day & staying cyclists spend £3.6m on both the Camel (400,000+ users) and Tarka Trail (28km and 48km) for cyclists in Cornwall but this is thought to be a significant under-estimate perhaps by a factor of 3. Combined, the two trails sustain 60 FTE jobs and sustain many more in part. Ref: [http://www.cornwall.gov.uk/default.aspx?page=13405](http://www.cornwall.gov.uk/default.aspx?page=13405)
Parkhead Station tearoom and accommodation on the C2C Cycle Route: On a premium day, (bank holiday, weekend or fine weather day), circa 3,000 people pass this successful business and/or call in

**Cycling in Europe and the UK**

All forms of cycling are growing in popularity all over the developed world. It is a hugely popular activity in mainland Europe and the take-up in the UK has been gradually increasing year on year since the late 1990s. Bradley Wiggins winning the Tour de France and Chris Froome coming second in 2012 was a pivotal event. When Wiggins then won an Olympic gold and the British cycling team took the velodrome by storm, cycling really took a leap forward. This was obviously added to with Chris Froome winning the Tour de France in 2013.

Cycling in the UK was greatly boosted by these high profile events and even though the summer of 2012 was the wettest on record, the result was new cyclists were born, retired cyclists returned to their bikes and current cyclists tried to cycle even more. Spurred on by these phenomenal successes, more funding is now being released to promote cycling and improve the cycling infrastructure in the UK and it makes sense to plan for optimum gain.

The fact that the first three days of the 2014 Tour de France are going to be held in Yorkshire and London is further recognition that cycling has returned to the UK as a national pastime and it’s not surprising that many regions are seeking ways to gain benefit.

**Northumberland**

Cycle tourism is a sleeping giant in Northumberland for a variety of reasons but if ever there was a ‘right’ time to put major effort into waking it up it is now. This Asset Review and Management Plan of the cycling offer in Northumberland is long overdue but ideally timed if cycling is to be launched as a major promotional thrust in 2014. It recommends a measured approach and identifies low risk, low cost strategies which, with appropriate management and marketing, will enable associated agencies and businesses to create, and benefit from, a quality cycling offer at a controlled pace and in a planned direction. A SWOT analysis of cycling in Northumberland can be found in SWOT.
Conclusion

Using the Cycling Tourism Standards Self-Assessment Table, Northumberland is rated as a 2 star cycle destination. It is a concern that on balance, our strengths plus opportunities amount to less than weaknesses plus threats. This ratio reflects the size of the challenge faced by all bodies in Northumberland to upgrade its cycling offer to the extent that the real-time experience matches the undoubted potential and promise without which associated economic benefits won’t appear and 5 stars in the standards table will always remain a pipe dream. Within the further parts, the report will demonstrate why that is and what we can do to succeed.
A prime remit for this entire report is to provide a detailed and accurate economic picture of the cycling offer for Northumberland and its potential economic growth. In the narrative, economic growth is recognised as a pre cursor to job safeguarding and creation. Evidence of a growing market in cycling and cycle tourism is clear all over Europe. What is less clear is irrefutable evidence of the current volume and economic return of recreational cycling and cycle tourism in Northumberland. DFDS, for example, have 200,000+ inbound visitors per annum, what percentage cycle (or would), and how many visit Northumberland is unsubstantiated. What is clear is the trend for actual and potential growth in both aspects of leisure cycling will bypass Northumberland unless it energises and re-shapes its offer in the very near future.

**Cycling Data Trends**

Detailed information can be found in [Appendix 2](#) for:

**Europe:**

Cycling tourism is one of the biggest growth sectors in tourism. A new study says there are an estimated 2.295 billion cycle tourism trips in Europe worth €44 billion per annum to Europe. Britain still lags behind countries with similar weather, population density and geography. [Appendix 2.3](#)
UK:
Has had an **11% increase** in number of cyclists in 2011 = **13 million** Britons cycling. The UK’s cycling sector generates **£2.9 billion** for the British economy equating to a value of **£230** for every cycling Briton in the country.

Sky and British Cycling are on course to convert **1 million** more people to becoming regular cyclists which will generate **£141 million**.

Over **25,000 people** are currently competing regularly in competitive events. Almost **3,500 competitive cycling events** now take place each year.
Over **300 sportives** (cycling participation events) have taken place in the last 12 months involving over **100,000 participants**. [Appendix 2.4]

Northumberland / North East:
There are 315 miles of Long Distance Cycle Routes in Northumberland. There are circa 91 miles of dedicated MTB routes but only at Kielder.
There is the potential to offer many miles of ‘natural’ MTB routes in conjunction with the access network in Northumberland. Northumberland lacks any set of accurate and meaningful data on cyclists, and their impact on the economy. [Appendix 2.8]

Case Studies of Products, Cycling Businesses and Initiatives in UK

The case studies are perhaps the most accurate pieces of data within Part 2 and should be a focus for the reader.
Over the last decade there have been many cycling holiday companies established and also closed down. Reasons for the closure of cycling holiday providers can be part explained in [Appendix 2.18]
Some of the reasons for failure can be written off as current economic climate; however the majority of established cycling holiday providers are growing their UK offer.

**Cycle route Product – Way of the Roses**

The Way of the Roses is 174 miles (274km) in length and is a recent addition to the ‘coast to coast’ cycle routes family that starts at Morecambe on the west coast and finishes at Bridlington on the East Coast. Estimated 2012 impact - 130,000 leisure cycle trips; 8,000 cycled the entire length of the route; route generated £3 million for local economy.
Over 60 full time equivalent jobs have been created by cyclist spend [Appendix 2.12]

**Cycle Tour Operator – Saddle Skedaddle**
The largest independent cycle tour operator in the UK selling UK and worldwide holidays. They turn over circa £2.5million and sell approximately one third of their products as UK trips. Based at The Cycle Hub, Newcastle they employ 12 plus office based staff and 50 plus part and full time guides.
Two thirds of their UK product impacts on Northumberland with their most popular holidays being The C2C Cycle Route, Hadrian’s Cycleway and the Coast & Castles Cycle Route in that order. Appendix 2.13

**Bike Hire Centre – Cyclexperience**
A large multi-site cycle hire and cycle shop business that has been trading for 20 years experiencing the challenges of the current economic situation. Growth has slowed but numbers of customers has stayed at 15,000 cycle hires per annum with a bike hire turnover of approximately £225,000. Appendix 2.14

**Cyclists Café and Guesthouse – Parkhead Station**
A business that relies 90% on cyclists, Parkhead Station has been specifically designed with cyclists and walkers in mind. It is renowned within the cycling fraternity and it occupies a prime location on the C2C Cycle Route. On a yearly average they have 30 cyclists passing through on the C2C Cycle Route per hour between 09:00 – 17:00 Appendix 2.15

**The Tourism Business Network - Scottish Borders Visitor Network (formally Tweed Association)**
Their catchment area covers Selkirk, Eyemouth and Peebles. SBVN has 180 plus members. Appendix 2.16

**Multi Business / Agency Initiative - Scotland and the 7stanes**
The ‘Economic Value of Mountain Biking in Scotland’ estimates the total number of mountain biking visits at over 1.3 million per year. Nearly 600,000 visitors come to Scotland to sample its purpose-built trails. 22.5% of these visitors stay overnight which amounts to almost 300,000 bed nights. 7stanes is a series of seven mountain biking areas located in the forests of Dumfries and Galloway and the Scottish Borders. The 7stanes attracts 400,000 visits to the south of Scotland annually which generate over £9million net additional spend to the local economy per annum. Appendix 2.17

**The Potential for Cycle Tourism**

Latest research from MINTEL finds that Brits spent some £120 million on dedicated cycling holidays in 2006. Over the year, UK cycling enthusiasts went on an impressive 450,000 two wheeled holidays with some operators experiencing as much as a 30% increase in bookings on 2005 figures.

The research however, shows this is merely the tip of the iceberg. MINTEL estimates that a further 2.25 million holidays taken by UK residents in 2012 included some kind of cycling adventure which might have included a day’s bike hire or a city sightseeing tour by cycle.

Despite being a niche market, it is forecast that demand for cycling holidays is set to reach new heights. Although 16% of adults (8 million) have already been on some kind of cycling holiday, as many as 12% who have not been on one would like to do so in the future. This suggests that (6 million) UK residents are on track to become first time cycling holidaymakers in the future. ref: Mintel 2013

"*Britain is becoming a nation of cycling enthusiasts. Cycling has been given a new lease of life by recent environmental issues, such as sustainable transport, carbon emissions and eco travel. With these topics set to grow in importance, cycling holidays should continue to*
see a rise in loyal followers. An increased interest in health and fitness and this year’s Tour de France will also help keep the nation pedalling.”

Richard Cope, Senior Travel Consultant: MINTEL

The Economic & Social Benefits of Developing Cycle Tourism

The development of cycle tourism can offer a considerable number of benefits, as discussed below:

• Cycle tourists represent a growing and valuable tourist market particularly for rural areas. Cycle tourists will spend at least as much in a rural area as other types of tourist if not more. Used Fact: The C2C Cycle Route regularly attracts over 13,000 coast-to-coast cyclists per year and excluding raised income from charity motives, the estimated average expenditure of £155 per person per trip contributes in excess of £2 million to the local economy.

• Cycle tourism generates local trade and offers income opportunities for rural businesses and services. Spending by cycle tourists can help to support rural pubs, village shops, small-scale rural attractions and rurally-based providers of accommodation. Cycle tourism also offers opportunities for the development of cycle hire and cycling holiday operations in rural areas. Used Fact: The Tarka Trail in North Devon has generated the establishment of some ten cycle hire operations along its length. The C2C Cycle Route has supported the establishment of a multiple successful cycle tour operations and has generated significant additional trade from tourism along the route.

• As cycle tourists will use local businesses, there is a greater likelihood that the money they spend will stay in the local economy

• Cycle tourism is an environmentally sustainable form of tourism with minimal impact on the environment and host communities

• Cycle tourism can help reduce traffic impact

• Cycle tourism makes good use of existing and often under-utilised resources e.g. country lanes and by-roads

• Cycle tourism can provide an alternative use for redundant or derelict resources e.g. disused railway lines

• Encouraging visitor arrivals and movement by bike can play an important role in visitor and traffic management

• Cycle tourism can help introduce rural traffic-calming which will further benefit both local people and tourists

• Cycle tourism can provide new incentives for people to visit an area and can help attract new types of visitor to new areas

Sustrans Cycle Tourism information data Ref TT1 (1999)
Conclusions

1. It has become increasingly obvious to the authors of this report that full stock of the status quo for Northumberland must be taken. Additionally we cannot continue to use inaccurate and out-of-date data and speculation from UK or wider EU research to provide evidence. Instead we must implement a plan for on-going collection of reliable data that can inform future cycle offer planning.

2. Northumberland is in a good position to record and use accurate cycle route data because:
   a. There are a good number of data counters although not all are in the right locations
   b. There is a good network of established businesses that can supply accurate and meaningful information on cyclist habits – see the case studies of the Tour Operator, Cafés & Guesthouses and The Business Network which provide a very accurate snapshot of actual statistics. This data has never been utilised in the past.

3. The fact that there are long term established businesses that serve the cycling market is a strong indicator of the economic impact of cycling in Northumberland. To a large extent they work in isolation but could be encouraged to work collectively to create a far stronger offer.

4. There is visual evidence in numerous areas of Northumberland and at the gateways of Tyne & Wear and Edinburgh where the volume of cyclists partaking in day rides and / or tours throughout the year can be witnessed. Unfortunately, there is an absence of written evidence to express this.

5. Managing the capacity of volume growth should be by effective networks and cross sector co-operation bolstered by a strong overall brand and clear leadership.

6. Creating a high quality network is the first step of product development; maintaining it is just as important. Cyclists have reasonable expectations that what the ‘promo’ promises will be what they get - the quality of the network infrastructure **hardware** is pivotal to that happening

7. There are clear un-tapped markets which, with research, could be pursued. DFDS current passengers and investigating new overseas markets are an obvious example of growth areas, as are the major conurbations to the north and south of Northumberland.

The authors of this report have worked and traveledl throughout the world in a cycle tourism capacity and have a positive view of the current and future situation for cycling as a job creator and visitor offer within the county. However, the inability to provide unassailable evidence within this report is an issue and one which is mirrored at all levels of cycle tourism data research across Europe.

This report, and Part 2 in particular, refers to the fact economic strengthening and overall support for cycling relies to a great extent on volume. Put simply, more cyclists, whether they are local riders or visitors, comprise the recreational cycling market and contribute to growing the cycle tourism offer. Supply and demand is inevitably a ‘chicken and egg’ situation.
Part 3: The Current Offer

A full and detailed review of the current recreational cycling and cycle tourism offer can be found in Appendix 3.

Cycle Route Management

The basic cycling infrastructure is in place but there is no coordinated management of all of the factors which make up the total cycling offer.

In Northumberland there is a lack of:

- Meaningful monitoring to provide a basis for overall strategy
- Centralised co-ordination of any new cycling initiatives, events, routes.
  An overall strategic plan for signage, upkeep and route information.
- Linkage between a highway strategy, and a tourism strategy to inform cycle route planning.
- Prioritised upkeep of roads which are also promoted cycle routes
- Marketing and branding
- Quality assurance

To address these gaps there is a need for a comprehensive county-wide Cycle Master Plan.
Cross Border Collaboration

This is an aspect of Cycle Route Management that could provide great benefits to the cycling offer in Northumberland. Many established long distance trails cross into Scottish Borders, Cumbria, Tyne and, and County Durham. A full network of long distance cycle routes in the North of England at the present time can be found in Appendix 3.1.1

A case study of Hadrian’s Cycleway can be found in Appendix 3.1 Hadrian Cycleway falls within the remit of two local authorities, three District Councils, two national parks (one only very slightly), two tourism bodies, various tourism network groups and one major management body (Hadrian’s Wall Trust). The route was fully mapped but only partially opened in 2002. Some missing sections of route in West Cumbria have never been progressed. Cyclists undertaking any long distance cycle route see the ride as a complete experience and expect uniformity of standards throughout, and will cast a positive or negative view on the entire route, not just the local authority whose part of the route is appraised.

Cycle Routes

Much of existing cycle route signage in Northumberland is in poor condition because of lack of maintenance and there is no mechanism for managing the overall experience cyclists have of the full route process from decision to ride to returning home.

For routes to become products a range of key support services need to be in place so that the quality of the experience by users matches the promise of the promotion and ideally exceeds all reasonable expectations. Quality assurance would make all the difference.

Northumberland is more or less one big cycling area although there are barriers caused by main roads, rivers and railways. Cycling hubs still remain an aspiration. Cyclists are known to appreciate website-based information and many are smart phone orientated.

Northumberland is lucky to have a number of recognised long distance cycle routes including two of the most heavily used in the country passing through the county (the Sea to Sea Cycle Route and Hadrian’s Cycleway). The potential for growth on these and other routes is substantial; however none are consistent in signage, information, route condition etc.

Publications

Please see Appendix 3.2 for full analysis

Local Cycle Routes

There are numerous local cycle routes in Northumberland. These differ in appearance and quality, some are retailed, most are provided without charge and as a result don’t generate a sustainable income for map re-printing and any investment into the route itself.

A number of loop route maps exist, all of which have appeared as a result of unconnected initiatives so there is no branding or standardised format; stock control and reprinting is not assured. More cycling events are being organised in Northumberland but there is no process for route quality to be assessed or to avoid date clashes.

A potentially excellent Northumberland-wide map exists showing all the long distance routes and some links. It is in need of updating and rationalising. This is currently out of print; a reprint is the opportunity to update upgrades to the network once implemented. Appendix 3.2.1
Long Distance Linear Routes

All the main linear routes have been mapped but these maps aren’t reviewed annually so are prone to falling out of date. No income from map sales is re-invested in the routes; marketing is poor, the National Byway heritage cycle route is completely hidden from view with dated maps - if they can be found. Appendix 3.1

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Ordnance Survey Licenses

Most agencies in the region use out-dated pre1960 Ordnance Survey mapping to negate licensing issues, or use their (or partners) PSMAs (Public Sector Mapping Agreements) from Ordnance Survey and retail products which is not allowed under the PSMA terms.
As a result a very inconsistent and at times inaccurate mapping product is produced.

Cycling Areas

Many cycling areas are well known to local cyclists but often remain undiscovered by visiting cyclists. The main ‘cycling areas’ cover most of Northumberland such is its appeal and overlap but they tend to exist in relation to towns and holiday destinations. A breakdown of these ‘local knowledge’ cycling areas can be found in Appendix 3.3

Forms of Cycling In Northumberland

Broadly speaking, cyclists split naturally into two main categories, namely on-road and off-road. Both these classifications have numerous sub divisions but this report has no capacity to enlarge these sub-divisions in greater detail. Appendix 3.4

Road cycling

This aspect of cycling is growing in popularity and cycle shops are reporting steadily increasing sales of more expensive cycles.
**Implications:** New cyclists want to ride their high quality bikes on high quality routes. To attract them to cycle in Northumberland, all existing promoted cycle routes need to become 100% road cycling enabled. Additionally, identified link routes and spurs need revealing.
There are countless variations for high quality cycle rides in Northumberland although avoiding / crossing barriers i.e. rivers, main roads and railways is not easy. Road cyclists do not want to find themselves directed onto off-road route sections.

Off-Road Cycling

This aspect of cycling has two formats – mountain biking on a range of tracks of varying difficulty and on Greenways (rail paths etc) which offer easy flat family-type routes. Cyclists who prefer to ride off-road want to easily find and access such routes whether they be flat and easy suitable for novices and families or over challenging terrain which is what mountain bikers are seeking.

Mountain Biking

The mountain biking offer in Northumberland contrasts markedly. The success of the specialist trails for all abilities constructed at Kielder are steadily returning their investment. There is significant untapped potential for growing mountain biking on the county’s network of natural trails but no plans have been made to capitalise on this. Appendix 3.4

Recreational Cycling & Cycle Tourism in Northumberland 2013
Family / Leisure
Covering the ground swell of new cyclists and covering the majority of cycle tourists in the county. Routes range from long distance trails (Coast and Castle Cycle Route), to short safe traffic-free routes (The Wylam Waggonway, part of Hadrian's Cycleway).

Commuter (Utility Cycling)
In general people using a bicycle to get to work, or school for instance want a quick and safe method of getting from A-B. The same route can be used for both leisure and utility journeys. This report does not cover utility cycling in depth as a result.

E-bikes
Electric bikes are growing in popularity. The UK has the seventh largest electric bike market in Europe European Bicycle Industry & Market Profile report 2011. E-bikes seem to appeal to many who would not otherwise consider cycling and others who are keen to try a new experience. Their use on cycle routes such as the C2C Cycle Route is growing. There needs to be a suitable infrastructure to support e-bikes for successful operation but also be rider-focused.
A feasibility study was commissioned via The Market Town Welcome project and was undertaken in Northumberland National Park E-Bike Feasibility Study - Northumberland

Monitoring
As stated in Part 2 of this study, Cycle route monitoring is a vital piece of the jigsaw and should used to guide relevant cycling-related decisions. Locations for counters need to be reviewed to ascertain if they provide the most useful data.

Cycling Support Services
These are the cogs needed to present a true cycling product.
Cycle hire will always play a part in cycle tourism but supply and demand are not an easy mix. Bike transport to the start of routes and from the end as well during a route, are important facets of the total experience. Cycle tour operators also have an important role to play as indeed do baggage transfer services and cycle shops and other businesses operating in the Cycle Service Sector. A full breakdown of these services (including accommodation, websites, public transport, cafes) can be found in Appendix 3.5

Schemes and Supporters

Cyclists Welcome
Cyclists Welcome establishments are cyclist-friendly services many of which have been recommended by Cyclist Touring Club (CTC – see below) members. Listings include details of a variety of accommodation types, cafes and cycle hire operators. This scheme is evident in Northumberland.

Cyclists are Welcome
Cyclists are Welcome is a parallel for cyclists to the Walkers are Welcome scheme http://www.walkersarewelcome.org.uk/ but it has not been progressed in Northumberland. We would recommend that this is done.

Sustrans Voluntary Route Rangers
Conceived in the early days of the National Cycle Network (NCN), this idealistic approach for volunteers to keep an eye on, and do basic maintenance on sections of the NCN is commendable but only as good as the operating framework and consistency of the volunteers' actions. It is not functioning to any useful extent in Northumberland.
Cycling Organisations

There are four main organisations that cyclists can belong to all of which have slightly different priorities although there is a lot of overlap.

- The Cyclists’ Touring Club (http://www.ctc.org.uk/) operates under the trading brand CTC (or CTC the national cycling charity) and with over 69,000 members, markets itself as the UK’s national cyclists’ organisation. CTC’s interests include cycling for many purposes but mainly recreation, commuting and as a means of transport.

- British Cycling, formerly the British Cycling Federation (http://www.britishcycling.org.uk/) is the national governing body and administrative base for all aspects of cycle racing in the UK. Since it allied with Sky funding, it has embraced all aspects of cycling and significantly raised its profile. British Cycling has over 50,000 members and may well become the first choice cycling organisation to belong to.

- Sustrans (http://www.sustrans.org.uk/) helps local authorities and transport bodies to develop strategy and vision for the delivery of ambitious but achievable cycling, walking and sustainable travel change. It has supporters who have signed up to its ethos.

- The International Mountain Biking Association or IMBA (www.imba.org.uk) represents mountain bikers all over the world. The UK branch is fairly active in the North of England being represented by one of the authors of this report but nationally it is currently in a low key phase.

Events /Sportives and Clubs

The popularity of cycling has been mirrored in the increase of cycling events / sportive and club membership. More cycling events are being organised in Northumberland but there is no process for route quality to be assessed or to avoid date clashes. 25 cycling clubs are based or regularly ride in Northumberland. Membership numbers are currently unknown, as is their direct impact on the rural economy. Appendix 3.6

Cycle hubs

In 2007 a study was undertaken to review the cycle tourism offer in Northumberland National Park (CycleTRAX). This study made a number of recommendations only one of which was acted on in part – the creation of four cycling hubs at Wooler, Haltwhistle, Bellingham with Kielder and Haltwhistle.

Following a feasibility study, implementation of the £130,000 Cycle Hubs project in Wooler and Haltwhistle commenced in 2011.

A scoping study for electric bikes was additional to this project as well as the production of a cycle route map for each location. Unfortunately, on-going project funding and a sustainable legacy were not factored in; these two maps detailing 7 circular routes in each location are the only tangible outputs from this project.

Activity in Haltwhistle has now ceased and Haltwhistle doesn’t support a cycle shop. Commendably, in Wooler there are home-grown efforts to try and make Wooler a cycling hub of some recognition but the same out of town garage selling bikes and accessories at Wooler continues at more or less the same level as before.

Due to this lack of development we should not continue to claim both locations as established cycling hubs if the term is not to be under-valued and other responsible claims for cycling in Northumberland are to be believed.
Bellingham is now being tempted to claim cycling hubs status because it has a cycle shop and set of local route maps but again, this is not a claim that can be backed up in reality.

For more information, including a definition of ‘cycle-hubs’, please see Appendix 3.7

Hexham & Prudhoe Cycling Hubs Potential
In 2008 CycleTRAX was commissioned by Tynedale District Council (now no longer) to prepare two combined scoping / feasibility studies – one for Hexham and one for Prudhoe – to overview how both locations could become cycling hubs. This was duly done but unfortunately the recommendations outlined in these studies have not yet been implemented.

The recommendation to create a cycle route loop map for each location is only now being taken forward by Tyne Valley MTB club for which funding is being sought.

The Cycling Hub Newcastle
The result of a combined effort from Saddle Skedaddle Cycling Holidays and The Cycle Centre, Byker, the Cycle Hub is a social enterprise that promotes and facilitates cycling, complete with bike hire facilities, cafe, bike shop and repair workshop. It has grown in popularity since it established in 2012.

The Sill
The Sill is an exciting £10.5 million initiative of international importance that will create a Landscape Discovery Centre and new YHA Youth Hostel at Once Brewed in Northumberland. The project will host extensive learning and participation activities, at and beyond this new hub with the aim of welcoming new visitors to the park and inspiring future generations to celebrate, enjoy and conserve the incredible landscape of Northumberland National Park and well beyond.

The intention is to develop The Sill as a sustainable transport hub, able to integrate and promote the Hadrian’s Country Wall County Bus service (AD122) with Hadrian’s Cycleway, nearby circular cycle routes radiating from Haltwhistle, the PROW network and electric vehicle charging network. Visitors will be encouraged to transfer from using the private car to other sustainable means of access. (www.thesill.org.uk)

Electronic Information and Navigational Aids
Global Positioning System (GPS) is now being used to provide all sorts of information for visitors but is most well known in the form of Sat-nav in vehicles. More and more walkers and mountaineers are using a hand-held GPS unit as a navigational aid. Latest versions have OS mapping on them and now certain mobile phones are carrying OS mapping with built-in GPS capability. This is the trend.

Generally speaking, mountain bikers are a techie lot and extra gadgetry always appeals to a certain age group and profile. GPS equipment is becoming increasingly popular in the mountain biking fraternity for navigation and trail recording and while it cannot yet completely replace conventional maps, there are things however a GPS makes it a lot easier to do.

Applications for mobile devices are becoming more available and more accurate, however their use in rural areas without an internet connection and limited accuracy off road leave them as a secondary tool for navigation. Difficulties exist due to poor signal strengths and broadband provision.

As good as an electrical device can be, it can never, and should never, totally replace other methods of navigation. Battery life, 2, 3, & 4G signals, weather conditions and more
contribute to a weakness that means should still rely on traditional tools such as map; compass, signage etc. are still required.

More information can be found Appendix 3.8

**Conclusion**

The basic infrastructure is largely in place but needs attention urgently to bring it up to an acceptable standard and provided the right improvements are made in the right place this shouldn’t be costly. The same applies to support services which need energising and better information. Marketing too is sorely in need of guidance and the introduction of branding backed up by quality products is long overdue.

Payback and Managing the experience are the missing ingredients and recommendations how both can be provided can be found in Part 5.
Part 4: Infrastructure, Product Development and Bringing the Existing Offer up to Standard

The hardware or cycling infrastructure comprising routes and signing is about 90% in place in Northumberland and only needs targeted attention to bring up to standard, despite a lack of recent maintenance. The missing 10% makes the difference between success and disappointment, so it is very important that these gaps are recognised and addressed.

The software makes the hardware function and turns routes into products. It comprises the right mix of branding, marketing, support information, training of, and advice to, service-providers and the overall management of the whole process. The development of a cycle Master Plan for the county would allow all of these important aspects of the cycle offer to be coordinated.

In real terms this is not a huge task for both the hardware and software to succeed, but for the benefits to be achieved for 2014 then the process must begin as soon as possible and be placed in the right hands if the opportunity to upgrade to the required standard is to be grasped.

The hardware or infrastructure, and a new approach to the software is outlined in this section.
Proposed Cycle Route Network

This is what the network should look like, but how do we get there? We have a full and annotated breakdown of the improvements needed to make this happen in Appendix 4. This is an ambitious but realistic vision of the proposed main cycle routes network in Northumberland with links, spurs and braids.
There are 3 principal strands to Cycle Route Development:

1. Creating high quality routes: Cycle tourist focused linear or loop routes
2. Managing the experience* looking after the ‘customer’
3. Unlocking the potential: Linking the 'customer' with service-providers for mutual gain

*Looking after the end-to-end experience of the route user AND the start-to-finish condition of the route. This is not currently done in Northumberland.

Loos and brews are important to cyclists

Improving the Cycle Route Network in Northumberland

A full breakdown of geographic locations for network improvements can be found in Appendix 4.1. Many of these improvements are small scale or low cost, but require a co-ordinated approach to succeed.

Signage
All signing and way marking needs to be of consistently high standard and different levels of information are appropriate at different locations. This has to be managed - see Appendix 4.2 for full details.

Mapping
All new mapping needs to follow a common brand that the county / region adopt as standard.
Best practise and guidance needs to be demonstrated to maintain a high standard of publication. A value should be placed on all mapping that is published for established routes to provide a level of sustainability that does not rely solely on funding for the future.
**New Route and Product Creation**

The promoted network needs to be of a consistent high standard with links and spurs of the same standard; routes need to have identities to become recognised. Existing products need to be improved and new products can easily be provided using the existing route, road and trails network more creatively. A county wide plan for the development and promotion of new routes is needed. [Appendix 4.3](#)

**Proposed New Routes and Enhancements to Existing Routes**

There are several 'in production' cycle routes within Northumberland that are at close to funding applications, these are in [Appendix 4.3](#).

Similarly a range of enhancements to existing routes are available to strengthen the development of routes into products. [Appendix 4.1](#).

In other words there are ‘oven ready’ routes and improvements that can be inserted into funding applications and regional strategies.
Mountain Biking Potential

This map shows in red the location of one of the finest mountain bike trails networks in England. It is a long way from where people live and whilst day visits are popular, visits requiring an overnight stop are becoming more common. Providing a reliable bike taxi service from Newcastle is a possibility for increasing ‘wheel tread’ at Kielder.

The map also shows the untapped potential for Northumberland to capitalise on the exponentially increasing popularity of mountain biking on access network trails if only high quality routes information was readily available to enthusiasts. Unsurprisingly, many riders do not have the skill or aptitude to research and construct their own quality routes.
Disused Railway Tracks in Northumberland

The map below shows the many long sections of disused railway tracks (DRT) lying dormant in Northumberland but none of the short sections. The few DRTs in Northumberland that were kept in public ownership are well used but the many that remain privately owned are a tantalisingly unavailable resource for access to and through the countryside.

It would unrealistically ambitious to think all of these DRTs could again become available for public use and enjoyment but with careful negotiation and management, some could.

NB. The four towns in red were the proposed locations for cycling hubs identified in a 2008 feasibility study. Sections of DRT at Wooler offer flat, family-friendly, traffic free routes and a safe way of avoiding a dangerous section of the A697.

There is broad support to see DRTs in Northumberland brought back into use again but as shared-use traffic-free Greenways in one of two forms – either a rough and ready singletrack or a 2m to 2.5m wide fine gravel-topped path. Tarmacking DRTs in rural locations would be most inappropriate.
Out of necessity and design, railway lines are linear, flat and effective man-made transport corridors linking rural communities. They pass through some of the finest scenery in Northumberland, and indeed the UK, even today they provide viewing pleasures which are otherwise denied to the public.

These railway tracks are wonderful linear heritage and a fine tribute to Victorian engineering. They are as much part of history as Hadrian’s Wall and in much the same way they should be preserved for current and future generations to enjoy and benefit from long into the future.

The best way to do this is to reopen as many targeted sections of enclosed track bed as possible for traffic-free public access for people to enjoy on foot, by cycle and on horseback. The many popular rail paths that are open for public enjoyment and benefit prove this is never the nightmare some landowners fear. Even sharing with occasional tractor use isn’t a problem if suitably facilitated.

**Improving the Infrastructure (The Hardware):**

Summarised here is what should be factored into the 10% that is needed to bring the existing network infrastructure hardware up to standard. The rationale is simple and is predicated on recognising that….

1) Creating a high quality network is the first step of product development; maintaining it is just as important

2) Cyclists have reasonable expectations that what the ‘promo’ promises will be what they get - the quality of the network infrastructure *hardware* is pivotal to that happening

3) Cyclists aren’t a homogenous group of people all with the same needs and the network infrastructure hardware needs to take this into account

4) Road cyclists do not want to find themselves directed onto off-road route sections

5) Cyclists who prefer to ride off-road want to easily find and access such routes whether they be flat and easy suitable for novices and families or over challenging terrain which is what mountain bikers are seeking

6) The promoted network needs to be of a consistent high standard with links and spurs of the same standard; routes need to have identities to become recognised

7) All signing and way-marking needs to be of consistently high standard and different levels of information are appropriate at different locations. This has to be managed.

8) The work required to bring the infrastructure up to a consistent standard is not huge or costly but it does need to doing commencing as soon as possible for 2014

9) Maintaining the infrastructure at this high standard is achievable but needs support from all relevant bodies. Managing this can be partly achieved from payback.

10) Existing products need to be improved; new products can easily be provided using the existing route, road and trails network more creatively

11) New products should be released in a controlled and managed way to ensure continued growth of the cycle offer and to attract cyclists back to the area.
12) Other regions in the UK and abroad are actively developing their cycling offer and Northumberland must do likewise if it is to take advantage of a naturally expanding opportunity and turn this universal market growth into local economic benefit.

13) Managing the network infrastructure is critical to maintain a quality experience and it is essential that lessons are learnt from what hasn’t worked in the past.

**Improving the Marketing (The Software):**

It is the software that turns routes into products and makes the route hardware function. It comprises the right mix of branding, marketing, support information, training of, and advice to, service-providers and the overall management of the whole process.

In the past, marketing has been very general and customer satisfaction has relied heavily on the quality of the landscape making up for the inadequacies of the infrastructure and mixed quality of user support standards. Until recently this has just about been nearly been good enough to pass muster and network users have become accustomed to a range of mediocre standards as being the norm.

There has been very little awareness by those producing promotional copy that product quality has never been considered and lack of insight has meant that route information has been idealistic without being backed up on the ground.

One NorthEast commissioned a marketing-focused Cycle Tourism Strategy in 2003 however this was never fully implemented and, as well as now being out of date, lacks a championing body to progress recommendations.

The following factors should be considered in marketing and supporting the improved cycling offer in Northumberland for 2014. The rationale is simple and is predicated on recognising that…..

1) Cyclists have reasonable expectations that what the promo promises will be what they get regardless of the type and aspect of cycling they are interested in

2) Increasingly, both road and off-road cyclists are riding very expensive bikes, they have spending power to match but won’t accept second rate service

3) Like other segments, many cyclists are increasingly clued-up in terms of ‘smart’ communications and expect to source the information they need using on-line technology; providing high quality websites, useful function apps and access to information through current and new technologies has to become the norm in Northumberland

4) Even so, ‘old fashioned’ maps are still an essential requirement as part of a range of product services albeit in the best format possible as they perform functions that modern technology cannot guarantee to provide in all circumstances

5) Branding needs to be taken seriously and only the introduction of quality control from a central point can put a halt to ad hoc initiatives of varied quality which will fragment and weaken the profile of cycling in Northumberland.
**Part 5 - Recommendations**

Note: All mention of Northumberland’s cycle offer or network includes all forms of cycling.

NCG  Northumberland Cycle Group  
NT  Northumberland Tourism  
NCC  Northumberland County Council  
NNPA  Northumberland National Park Authority

<table>
<thead>
<tr>
<th>Recommendation</th>
<th>Who?</th>
<th>When?</th>
<th>Priority</th>
<th>Cost level</th>
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<tbody>
<tr>
<td><em><em>1. Gain county-wide commitment to Northumberland’s ambition to be a 5</em> cycle destination</em>*</td>
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<tr>
<td>1a) Distribute this report to individuals and organisations who can contribute resources whether financial, time, skills, promotion or just enthusiastic support.</td>
<td>NT</td>
<td>Nov 13</td>
<td>High</td>
<td>Low</td>
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<td>1b) Include cycling development in relevant county plans including NCC Core Strategy, Northumberland’s Destination Management Plan etc</td>
<td>NT, NCG</td>
<td>Ongoing</td>
<td>High</td>
<td>Low</td>
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<tr>
<td>1c) Convene a Northumberland Cycle Stakeholders Group (NCG) who can drive forward cycle ambitions and identify &amp; commit to appropriate actions through the development and adoption of a county cycle master plan. Some of these are recommended below.</td>
<td>NT</td>
<td>Jan 14</td>
<td>High</td>
<td>Low</td>
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<td>1d) Establish a county cycle network to inform and encourage participation from all appropriate or interested parties.</td>
<td>NCG</td>
<td>Ongoing</td>
<td>High</td>
<td>Low</td>
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<td>1e) Consider ways to open partnerships with neighbouring counties, other proactive UK cycling area and organisations, and other European organisations and areas including the EuroVelo Cycle Route Network.</td>
<td>NCG</td>
<td>Ongoing</td>
<td>Med</td>
<td>Low</td>
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| **2. Cycle Product Management** |        |        |          |            |
| 2a) Ensure mechanisms are in place for timely collection and dissemination of up to date information to include:  
- Monitoring of cycle route traffic  
- Feedback from cyclists  
- Quality monitoring of routes and remedial action required  
- Information from businesses of cyclist numbers and economic impact. | NCG, NCC, NT | Early 2014 | High     | Med        |
| 2b) Continue to monitor developments in cycling nationally and internationally to ensure lessons are learnt and opportunities identified. | NCG    | Ongoing| Med      | Low        |
| 2c) Develop a plan to bring current cycle route network up to an acceptable standard, and for ongoing maintenance | NCG, NCC, Sustrans | April 2014? | High     | Med (costed out) |
| 2d) Maintain a database of cycle events and identify gaps and opportunities. | NT     | Ongoing| Med      | Low        |
### Marketing & Promotion

<table>
<thead>
<tr>
<th>3a) Plan for a county-wide series of quality maps and route materials that are self sustaining through sales or other visitor payback methods</th>
<th>NCG</th>
<th>End 2014</th>
<th>Med</th>
<th>High (coord partner budgets)</th>
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<tr>
<td>3b) Develop a coordinated plan to brand and promote the county’s cycle offer including cycle events. Include hierarchy of website information provision.</td>
<td>NCG</td>
<td>End 2014</td>
<td>High</td>
<td>Low</td>
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<td>3c) Ensure information provided using relevant technologies and plan in place to keep up to date with technological developments. Lobby for improved mobile phone signal coverage.</td>
<td>NCG</td>
<td>Ongoing</td>
<td>Med</td>
<td>Med? Dep on plans developed</td>
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### Cycle Product Development

<table>
<thead>
<tr>
<th>4a) Develop a plan for developing Northumberland’s cycle offer using the improved information provided (above). Identify gaps and areas to encourage and/or support such as:</th>
<th>NCG</th>
<th>June 2014</th>
<th>High</th>
<th>Low</th>
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<tr>
<td>• Disused Railway Tracks (DRT)</td>
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<td>• Cycle hire</td>
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<td>• Cycle friendly accommodation</td>
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<td>• Cycle tours</td>
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<td>• Bike transport and cycle friendly public transport.</td>
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<td>4b) Consider prioritisation and funding for already identified new routes including:</td>
<td>NCG, NT, NCC, NNPA etc</td>
<td>June 2014</td>
<td>High</td>
<td>High (funding req)</td>
</tr>
<tr>
<td>• Grand Tour of Northumberland</td>
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<td>• Borderlands cycle route</td>
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<td>• Cycle tour of Cheviots &amp; Kielder</td>
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<td>• Source to Sea routes</td>
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<td>• The Sandstone Way</td>
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<td>• The Dozen Dales cycle routes</td>
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<td>4c) Develop a cycle toolkit to assist businesses of all kinds to improve and develop their offer to cyclists.</td>
<td>NCG</td>
<td>June 2014</td>
<td>High</td>
<td>Med</td>
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<tr>
<td>4d) Encourage provision of more quality cycle events especially those over 2 days or more to maximise economic benefits. Include information on event provision in cycle toolkit to help businesses and ensure safety and quality.</td>
<td>NCG</td>
<td>Ongoing</td>
<td>Med</td>
<td>Low</td>
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<td>4e) Consider the development and promotion of cycle areas and cycle hubs, assist businesses to implement these and provide best practice advice in the cycle toolkit.</td>
<td>NCG</td>
<td>Ongoing</td>
<td>Med</td>
<td>Med</td>
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<tr>
<td>4f) Develop a programme of ongoing cycle-friendly training and support for businesses to develop their cycle offers.</td>
<td>NCG, NCC, NT</td>
<td>Ongoing</td>
<td>Med</td>
<td>Low</td>
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