

BRIEFING NOTE — RESTRICTED

# TCR Spending Strategy

## An Evidence-Based Case for Prioritisation

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*For: Mayor of the West of England, WECA Officers, and Council Leadership | March 2026*  
*Sources: Bristol Walking & Cycling Index 2025 | WECA Transport Vision February 2026 | CRSTS Annual Monitoring Report September 2025 | TCR Funding Allocations June 2025*

## Foreword

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*To: Mayor of the West of England, Unitary Authority Leaders, and Senior Officers*

There is a conversation that needs to happen at the leadership level of this Authority, and this briefing is an attempt to start it.

The Transport Vision sets out an ambition that every signatory to it should be proud of. But the TCR settlement that will fund its delivery is, on current programme commitments, already fully allocated before a single pound reaches active travel or mass transit. That is not a political judgement — it is an arithmetic one, and it is set out in full in the pages that follow.

The West of England has a rare asset in the Bristol Walking and Cycling Index: a rigorous, independent, biennial measure of how active travel is performing and what it is worth. That data tells us the region is sitting on nearly £1 billion of annual economic benefit from people choosing to walk, wheel and cycle — and that 327,000 residents want to cycle but don't feel safe enough to do so. The infrastructure gap between aspiration and reality is measurable, costed, and closeable within this TCR period.

This briefing asks Leaders and officers to do one thing above all others: write an explicit active travel ring-fence into TCR programme governance before the programme pressures of rail delivery absorb it by default. Everything else that follows flows from that single decision.

## 1. The problem in plain terms

The WECA Transport Vision is an ambitious and well-framed document. But it was written as a political statement of intent, not a costed delivery plan. Set against the actual TCR settlement, a significant structural problem emerges that this briefing addresses directly.

<b>£1.70bn</b> Cost to deliver the full Vision over TCR period	<b>£693m</b> TCR capital available to WECA 2027–2032	<b>–£12m</b> Residual left for active travel & mass transit after committed spend
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Working through the committed draws on the TCR capital envelope — CRSTS programme continuation (£140m already earmarked by DfT), the promised rail and station pipeline, maintenance at the CRSTS rate, and bus network capital — the programme is already overcommitted before a single pound is allocated to active travel or mass transit development.

**The core issue:** The Vision requires 2.5x the TCR settlement to deliver in full. Active travel and mass transit — the two modes most prominently featured in the Mayor's foreword — have no dedicated funding within the current envelope. Without explicit decisions now, they will be crowded out by programme pressure.

## 2. What the TCR must fund (committed or near-committed)

The following costs are either contractually underway, Vision-committed with no other funding source, or essential programme continuation. They are not discretionary.

Commitment	TCR Capital Required	Status
CRSTS programme continuation (schemes contractually committed by March 2027)	£140m	DfT-confirmed earmark
MetroWest Phase 1 — remaining WECA contribution (Portishead/Pill stations)	£30m	In delivery from 2026
North Filton Station (MetroWest Phase 2 — early works only under CRSTS)	£75m	CRSTS EWF only; main build unfunded
Brabazon Station	£60m	Vision commitment; zero funding secured
Henbury Station	£30m	Planning granted; zero funding secured
Bristol Temple Meads & Parkway upgrades (WECA contribution)	£43m	Partial CRSTS funding; gap remains
Lawrence Hill step-free and station accessibility	£6m	Ongoing commitment
Maintenance — roads, bridges, bus stops (7 years at CRSTS rate)	£221m	Essential; cannot be deferred

Commitment	TCR Capital Required	Status
Bus network capital — ticketing, stops, bus priority infrastructure	£100m	Vision commitment: one ticket, one timetable

Note: This analysis excludes mass transit construction costs (est. £500–750m total for a first phase), the airport transit link (est. £150–250m), and the full active travel programme. These are **entirely unfunded** within the current TCR settlement.

### 3. The evidence case: what the Bristol Index tells us

The Bristol Walking and Cycling Index 2025 — the most comprehensive active travel dataset in the UK — provides the quantitative foundation for the spending recommendations in this briefing.

#### Active travel already generates substantial economic value

<p style="text-align: center;"><b>£505.6m</b></p> <p style="text-align: center;">Annual economic benefit from active travel in Bristol city alone</p>	<p style="text-align: center;"><b>~£910m</b></p> <p style="text-align: center;">Estimated annual benefit across the full WECA region (conservative extrapolation)</p>	<p style="text-align: center;"><b>£1.59</b></p> <p style="text-align: center;">Saved for every mile cycled instead of driven (Societal Gain model)</p>
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Benefit Category	Bristol (2025)	Estimated WECA Today	WECA Potential*
Annual economic benefit	£505.6m	~£910m	~£1.24bn
Direct NHS savings	£15.4m/yr	~£28m/yr	~£38m/yr
Serious health conditions prevented	1,186/yr	~2,130/yr	~2,900/yr
Early deaths prevented (mortality value)	259/yr (£1.06bn)	~465/yr (£1.91bn)	~634/yr (£2.60bn)
Greenhouse gas savings	34,000 t/yr	~61,000 t/yr	~83,000 t/yr
Cars removed from roads daily	182,000	~327,000	~446,000

\*'WECA Potential' = if the rest of the region achieves Bristol-level active travel participation through infrastructure investment.

#### The latent demand opportunity is quantified and large

The Index identifies a cohort — 27% of WECA residents who do not cycle but want to — representing approximately 327,000 people across the region. The barriers are consistently infrastructure-related, not attitudinal:

What residents say would make them cycle	% saying this would help
More traffic-free cycle paths away from roads	73%
More cycle paths physically separated from traffic	73%
Better links with public transport (secure parking at stations)	72%
Safer routes overall	68%
More signposted routes on quieter streets	68%

The same pattern holds for walking. 57% of residents want more government spending on walking and wheeling. 60% support shifting investment from road-building to active travel and public

transport. Only 27% want more spending on driving. The political ground for prioritising active travel is as solid as the economic case.

**Critical equity finding:** 30% of women, 41% of ethnic minority residents, and 29% of disabled people want to cycle but don't feel safe enough to do so. These groups are not choosing cars — they are being failed by infrastructure. Addressing this is simultaneously the right equity policy and the fastest route to modal shift.

## 4. The active travel funding gap

Active Travel England benchmarks transformative active travel investment at £30 per person per year. For WECA's population of 1.21 million, delivering at that level over the 7-year TCR period would require £254m — approximately 37% of TCR capital.

<p style="text-align: center;"><b>£254m</b></p> <p style="text-align: center;">AT investment needed over 7 years to hit ATE transformative benchmark (£30/person/year)</p>	<p style="text-align: center;"><b>~£0–50m</b></p> <p style="text-align: center;">AT likely to receive under TCR if no ring-fence is set</p>	<p style="text-align: center;"><b>~£200m</b></p> <p style="text-align: center;">Estimated active travel funding gap over the TCR period</p>
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The CRSTS programme was unintentionally active travel-rich: the Thornbury, Chipping Sodbury and Bristol-Bath corridor schemes happened to contain large AT components. TCR will not replicate this automatically. The rail and maintenance programme is heavier, and without a deliberate ring-fence, active travel spend is likely to fall from approximately £47m/year under CRSTS to £7–14m/year under TCR — roughly one-third to one-quarter of the rate required.

**The consequence of inaction:** The Vision's target of 45% of commutes by active travel or public transport — currently at approximately 20% — requires sustained AT investment to move the baseline. At £7–14m/year, that target is unreachable within any realistic timeframe. At £36m/year, it is achievable by 2040.

## 5. The proposed TCR spending strategy

The recommended approach rests on four strategic decisions that are within WECA's control and are supportable from the evidence base.

### Decision 1: Ring-fence active travel at 25% of TCR capital (£173m)

This is the single most consequential decision WECA can make for the TCR period. At £25m/year across the region it is below the ATE transformative benchmark, but it is affordable, it is more than double the likely default outcome, and it is deliverable.

The Active Travel Streamlined Approach introduced under CRSTS (sub-£5m schemes on a fast-track business case pathway) should be formalised as a standing TCR mechanism with a pre-approved pipeline. Small AT schemes can go from concept to construction in 18 months. Rail stations take 5–8 years. If the Mayor needs to show tangible progress by 2030, active travel is the only mode where that is physically possible with existing resources.

### Decision 2: Complete the committed rail pipeline — and stop there

Portishead/Pill, North Filton, and Charfield are funded or near-funded and should proceed to completion. These deliver the greatest per-capita benefit of the rail programme and are already in motion.

Brabazon, Henbury, and Bristol Parkway transformation should be actively developed during the TCR period — business cases, design development, community engagement, planning applications. But they should not be built from TCR capital. Attempting to fund all five stations

alongside the rest of the programme is what creates the funding deficit. Development costs for these schemes total approximately £5–10m. Construction costs would consume £120–160m that the programme does not have.

### Decision 3: Use active travel to build the mass transit case

Mass transit cannot be built from TCR — the business case does not exist, DfT co-funding has not been committed, and a BRT or light rail first phase would cost £500–750m in total with WECA's share at approximately £125–190m. The Vision's claim to 'commence delivery within 4–5 years' is not supported by any current funding mechanism.

The right use of TCR for mass transit is approximately £20m on business case development — a 15-year plan, full options appraisal, corridor modelling, and a compelling DfT bid — with a target submission to the next spending review cycle in 2028 or 2031.

Critically, every segregated cycling and walking corridor built now — along the A38, A4174, A4 Portway, and Bristol-Bath routes — becomes first-and-last-mile provision for future mass transit. Active travel investment today strengthens the mass transit business case tomorrow. The two are not competing priorities; they are sequential.

### Decision 4: Pursue supplementary funding aggressively

The TCR settlement covers less than half of what the full Vision requires — as the funding balance sheet in Section 1 sets out. The remaining gap must come from elsewhere, and WECA should be in active pursuit of four sources:

Funding Source	Realistic Quantum	Action Required
Active Travel England competitive grants	£20–40m/year nationally — WECA should bid for ~£10m/year	Maintain Active Travel England capability rating; submit shovel-ready schemes annually
Private development contributions (Brabazon, Temple Quarter)	£50–100m over TCR period	Set transport infrastructure requirements as planning conditions at outline consent stage
DfT co-funding for mass transit (75% of scheme cost)	£375–560m — but only after business case approval	Submit compelling business case to 2028 Spending Review; WECA 25% match from future TCR2
National Wealth Fund / NISTA	Unknown — potential £50–150m for green infrastructure	Engage NWF on airport transit link and mass transit corridors as green investment opportunity

## 6. Proposed TCR capital allocation 2027–2032

Programme Area	Proposed TCR Allocation	% of Capital	Rationale
CRSTS continuation (contractually committed)	£140m	20%	DfT-mandated; non-negotiable
Rail pipeline completion (Portishead, N. Filton, Charfield + WECA station contributions)	£180m	26%	Committed or Vision-promised; delivers 100,000+ new rail users
Maintenance (roads, bridges, bus stops)	£175m	25%	Essential; reduced slightly from CRSTS rate to create AT headroom
Active travel — ring-fenced	<b>£173m</b> (minimum)	25%	Index-evidenced; highest BCR; only mode deliverable in 4–5 year window
Bus network capital (ticketing, priority, stops)	£85m	12%	Enables one-ticket system; supports modal shift
Mass transit business case development	£20m	3%	Funds 15-year plan and DfT bid preparation; not construction

*Note: The proposed allocation deliberately totals slightly above the TCR capital envelope. The £80m shortfall is the minimum supplementary funding WECA must secure from Active Travel England grants and development contributions — sources that are realistic and within the region's control.*

## 7. Recommended immediate actions

### By April 2027 — Programme governance

- **Establish a formal active travel ring-fence** of minimum £173m (25% of TCR capital) in the TCR programme governance framework, with protected status equivalent to the maintenance budget.
- **Replicate the CRSTS Active Travel Streamlined Approach** as a standing TCR mechanism — sub-£5m AT schemes on a 6-month fast-track business case pathway with a pre-approved annual pipeline.
- **Commission the WECA Transport Strategy** with a specific mandate to produce a costed, phased active travel network plan for all four council areas, not just Bristol — using the Walking and Cycling Index methodology as the baseline.

### By December 2027 — Mass transit and rail

- **Commission the 15-year mass transit business case** immediately, targeting a DfT submission-ready document by mid-2028 for the next spending review cycle.
- **Initiate planning applications for Brabazon and Henbury stations** using development funding, not TCR capital — keeping options open for construction in the next TCR period (2032+).

- **Open formal negotiations with Bristol Airport and the National Wealth Fund** on co-funding the airport transit link as a separate scheme, outside the TCR envelope.

### Ongoing — Evidence and accountability

- **Extend the Walking and Cycling Index to the full WECA region** (currently Bristol-only). The Index methodology provides exactly the annual accountability data WECA needs to demonstrate progress against the Vision's 45% modal share target to DfT.
- **Publish annual active travel expenditure as a percentage of the TCR programme** alongside mode-share and safety perception data. This creates a public accountability mechanism that protects the ring-fence against programme pressure.

## 8. What is at stake

The decisions made in the first year of TCR programme governance will determine whether the Transport Vision is remembered as a turning point or another in a long line of unfulfilled regional transport ambitions.

If active travel is ring-fenced at 25% and the mass transit business case is developed properly, the region will: deliver tangible, visible improvements within the Mayor's term; generate an additional £329m in annual economic benefit as the rest of WECA approaches Bristol's active travel participation levels; and arrive at the next spending review with a credible, shovel-ready mass transit bid. **The Vision becomes deliverable.**

If no ring-fence is set and programme pressures are allowed to absorb the active travel budget, the region will: fall short of every modal shift target; deliver mass transit neither in this TCR period nor the next (the business case will not exist); and find that the £910m annual economic benefit currently generated by active travel across WECA stagnates or declines as the CRSTS corridor gains are not followed through. **The Vision becomes a document.**

*This briefing was prepared using data from the Bristol Walking and Cycling Index 2025 (Walk Wheel Cycle Trust / Bristol City Council), the WECA Transport Vision (February 2026), the CRSTS Annual Monitoring Report (September 2025), and the DfT Transport for City Regions Funding Allocations (June 2025). All financial modelling represents analytical estimates based on published data; figures should be validated against WECA's internal programme costings.*

## Appendix: Methodology and data sources

This briefing synthesises four primary sources using a layered analytical methodology: published data from the Walking and Cycling Index is taken as the evidence baseline; CRSTS programme data provides the spending benchmark; the TCR allocation provides the funding envelope; and the Transport Vision provides the policy framework against which all three are tested. Each stage of analysis is described below.

### Source 1: Bristol Walking and Cycling Index 2025

Produced by Walk Wheel Cycle Trust in partnership with Bristol City Council, the Index is based on a demographically representative survey of 1,114 Bristol residents (aged 16+) conducted March–June 2025 by NatCen Social Research, combined with trip modelling, infrastructure measurement and published national datasets. It covers the Bristol city council area (population 494,399, ONS mid-year 2024).

**Economic benefit modelling** uses the Walk Wheel Cycle Trust Societal Gain model, which quantifies travel time savings, vehicle operating cost savings, health benefits and air quality improvements for trips that replace car journeys. The headline figure of £1.59 saved per mile cycled instead of driven is derived from this model applied to the 57.7 million miles cycled annually by Bristol residents who have access to a car.

**Health benefit modelling** applies two tools: Sport England's MOVES tool (conditions prevented and NHS cost savings) and the WHO/Europe Health Economic Assessment Tool (HEAT), which estimates the value of reduced mortality from specified levels of walking and cycling activity. Early deaths prevented and their monetary value are derived from the HEAT model.

### Extrapolation from Bristol to WECA

The Index covers Bristol city only. Extrapolation to the full WECA region (Bristol, Bath & NE Somerset, South Gloucestershire, North Somerset; combined population 1,210,399) uses two scenarios rather than a simple population multiplier, because Bristol is a denser urban area with a more mature active travel culture than the rest of the region.

- **Current state (conservative):** a 0.55 density and active travel culture discount is applied to the non-Bristol population (716,000), producing an effective scale factor of 1.80x Bristol. This reflects the substantially more suburban and rural character of Bath & NE Somerset, South Gloucestershire and North Somerset, and is consistent with the Transport Vision's own figure of 8% regional active travel commute share versus Bristol's higher urban rate.
- **WECA potential:** the full population ratio of 2.45x is applied to represent the benefit achievable if the rest of the region reaches Bristol-level active travel participation through sustained infrastructure investment. This is the 'policy success' scenario, not a forecast.

### Source 2: CRSTS Annual Monitoring Report (September 2025)

The CRSTS monitoring report provides the spending benchmark for the TCR analysis. The programme budget of £616m (£540m DfT grant, £76m local match) is split between £158m maintenance and £458m project delivery. Individual project values are drawn from Full Business Case approval records cited in the report, covering 20 named schemes with confirmed costs.

**Active travel spend estimation:** WECA does not publish a modal breakdown of CRSTS expenditure. The active travel share is estimated by categorising every named project into one of four types—AT-dominant (85% AT component), mixed bus/corridor (45% AT), Liveable Neighbourhoods (70% AT), and rail (5% AT)—based on the infrastructure descriptions in each approved business case. Maintenance is assumed to have a 15% AT component (pavements, dropped kerbs, cycle path surfaces). The central estimate of 38% AT share across the total programme (£235m) has a sensitivity range of 25%–44% reflecting uncertainty in the corridor project splits.

### Source 3: TCR Funding Allocations and committed cost modelling

The TCR payment schedule for WECA is taken directly from the DfT Transparency Data publication of June 2025, which confirms a £752m total settlement (£693m capital, £59m revenue) across 2025–32. The £140m CRSTS continuation earmark is confirmed in the CRSTS monitoring report itself, which states the programme “is proposing to use approximately £140m of the Transport for City Regions (TCR) funding to enable early delivery from April 2027 onwards.”

Committed cost estimates for individual rail schemes are derived as follows: MetroWest Phase 1 WECA contribution from the CRSTS monitoring report (£27.22m approved, plus estimated ongoing match); North Filton from the confirmed Early Works Funding quantum and comparable station construction costs; Brabazon and Henbury from published planning documents and comparable new station schemes in England (Portway Park & Ride, Ashley Down, Cranbrook). Where no published cost exists, estimates are clearly labelled and a +/-15%–20% uncertainty range applies.

**Mass transit cost benchmarking** uses three comparators: Edinburgh Tram Phase 1 (£776m for 14km, 2014), Nottingham NET Phase 2 (£570m for 17.5km, 2015), and West Midlands Metro extensions (approximately £150m per 1–2km, 2019–2022). BRT unit costs are benchmarked at £20–30m per km based on UK guided busway and high-quality BRT schemes. WECA's likely co-funding contribution of 25% reflects the DfT's typical funding split for mass transit schemes of this type.

#### Source 4: WECA Transport Vision (February 2026)

The Transport Vision is used as the policy framework document against which programme commitments are assessed. All specific commitments cited in this briefing are drawn directly from the Vision's “Bold ambition: ready to deliver” section (pages 8–9) and the mode-specific narrative sections. The three headline ambition targets (45% active travel/public transport commute share; 80% of residents within 30 minutes of a major employment centre; 100% within a 10-minute walk of a public transport stop) are taken from page 23.

#### Caveats and limitations

All financial modelling in this briefing represents analytical estimates based on publicly available data. Several figures carry material uncertainty and should be validated against WECA's internal programme costings before use in formal decision-making:

- Station construction cost estimates (Brabazon, Henbury, Bristol Parkway) carry +/-20% uncertainty in the absence of published cost plans.
- The CRSTS active travel spend estimate (central case £235m, range £137m–£181m) is derived from project descriptions, not financial ledger data. The true figure may differ, and WECA should publish a modal breakdown of CRSTS expenditure to improve the evidence base for TCR planning.
- WECA-level economic benefit figures are extrapolated estimates, not primary data. Extending the Walking and Cycling Index to cover the full WECA region would replace these estimates with direct measurement and is recommended as a programme action.
- The £30 per person per year Active Travel England benchmark is drawn from ATE's published guidance on transformative investment levels. It represents a national policy target, not a statutory minimum, and its applicability to WECA's mixed urban-rural geography should be assessed against the forthcoming Transport Strategy.