# North Wales Transport Commission

# Progress Statement January 2023

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# 1.   Introduction

The North Wales Transport Commission was established in spring 2022 to assess the problems, opportunities, challenges and objectives for realising a sustainable integrated and multi-modal transport system in north Wales.

The Commission is taking a multi-modal approach, looking at all north Wales to consider how modal shift can be achieved in both urban and rural areas. The Commission's remit covers the local authority areas of Anglesey, Gwynedd, Conwy, Denbighshire, Flintshire and Wrexham.

The Commission is considering interventions in the short, medium and long term to shift to more sustainable means of travel and freight movement.

We want these improvements to offer viable alternatives to the private car through a transport system that makes life better for all people in the region, in both urban and rural areas and supports the region's journey to net zero.

This progress statement summarises our work to date and explains:

- The progress we have made so far in understanding people's movements.
- Our views on the transport challenges and what the opportunities are to improve transport, and
- The transport options within specific areas that support less use of the private car and enable moves to public transport and active travel.

The Commission has found a lot of good work already underway or in development in north Wales, therefore we will support and endorse this work, seeking to enhance and prioritise proposals.

We have not arrived at any firm conclusions or recommendations; we want our final recommendations to be informed by discussion with stakeholders. This progress report is focused on outlining what we have found so far, in order to allow for feedback on whether there is anything we have missed, and what potential solutions or opportunities there might be.

We are considering the potential improvements to transport in North Wales that match with local, regional and national policies – in particular, Llwybr Newydd: The Wales Transport Strategy, but also the Well-being of Future Generations Act, Net Zero Wales, and the Union Connectivity Review.

We are also conscious that the final report of the Welsh Government's Roads Review Panel is due for publication soon. The Commission is not able to comment on specific recommendations of the Roads Review, but we will consider the strategic interventions needed for better transport provision across the region, and the steps that can be taken to achieve better networks, more useable services and fewer people travelling by private car.

None of these ambitions are without challenge, but current arrangements will not achieve any significant change. Levels of public transport use will not increase while the infrastructure and services are lacking and there is a need for more profound and progressive change.

Section 2 describes the work we have done to date and Section 3 outlines what the travel data we have considered has told us. Section 4 considers three sub-regions which we have identified in the east, the central area and the west, and Section 5 describes visitor and tourism travel. Section 6 then outlines problems and challenges, and Section 7 describes opportunities. Finally, Section 8 outlines the next steps.

## 2.    Work to date

Over this first part of the Commission's work, we wanted to review available travel data to see what it could tell us about transport in north Wales. As we are considering a whole region, not a single scheme, there was a lot of data available, but there were some things the Commission wanted to identify and understand. These were as follows:

- Key transport movement patterns and their origins and destinations.
- Details for transport operations such as hours of operation, frequencies, and important connections and routes.
- Whether there are conflicts between policy and delivery at local and national levels.
- What initiatives and behaviours reduce the need to travel and encourage modal shift.
- The extent to which there are cost-effective/ affordable travel opportunities available for work, services, education and leisure for both car owning and non-car owning families.

- How to provide better service levels from existing public transport infrastructure, including any improvements and modifications needed to the infrastructure.
- The extent to which improved walking and cycling (active travel) infrastructure can provide good opportunities for local everyday journeys.
- Potential incentives for reducing the proportion of current journeys being made by car, and particularly single occupancy cars.
- Methods of funding that could bring a better balance between the costs of travel by car and public transport.
- Points of traffic congestion during leisure and holiday peak times and assessment of the extent to which improved public transport or active travel could ease this pressure.

The Commission has analysed a lot of data and information on how people travel into and around the region.

## 3. What the data told us

The settlements, services and the majority of the population is clustered around a northern arc, broadly following the Menai Strait, Northern Coast and the River Dee, as shown on Figure 1. This arc also contains the greatest proportion of employment opportunities in north Wales, the most direct roads (particularly the A55) and the bulk of the north Wales rail infrastructure.
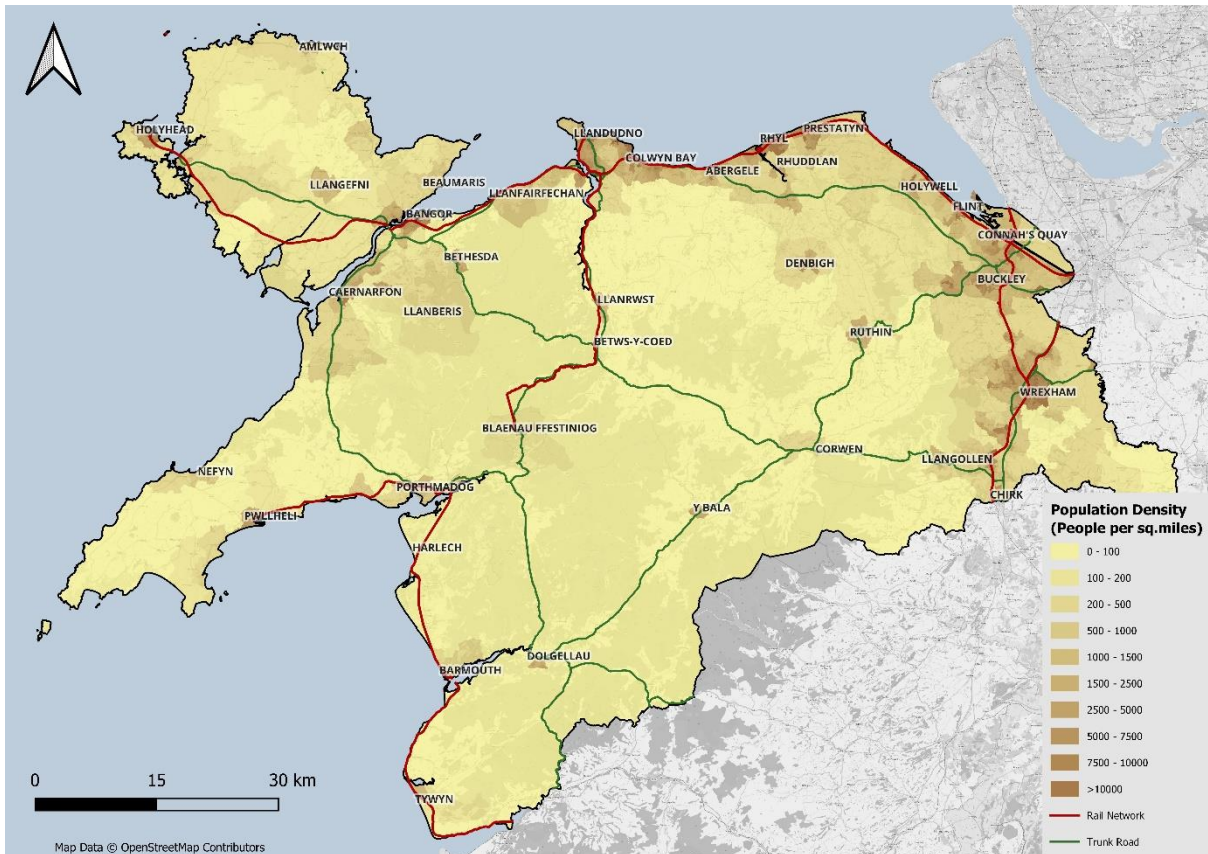
**Figure 1: North Wales population data and principal road and rail network**

Rural areas generally further south than the coast have significantly fewer regular public transport services.

A lot of journeys are only of a short length, with about a third being less than 5km and more than two thirds being less than 15km. Most journeys are within the same local authority area or to a neighbouring area, in particular many journeys that start in rural areas have destinations in nearby urban areas. While this is true for the region as a whole, differences in these patterns exist – in particular when comparing rural and urban areas. In general, the more urbanised areas have a higher proportion of short distance journeys below 5km, while the more rural areas have a lower proportion of short distance journeys. For example, more than a third of journeys starting in the Wrexham urban area are less than 5km and more than three quarters are less than 15km. In contrast in the rural parts of Conwy, only 5-10% of trips are below 5km and half of journeys are less than 15km. This is shown in Figure 2.
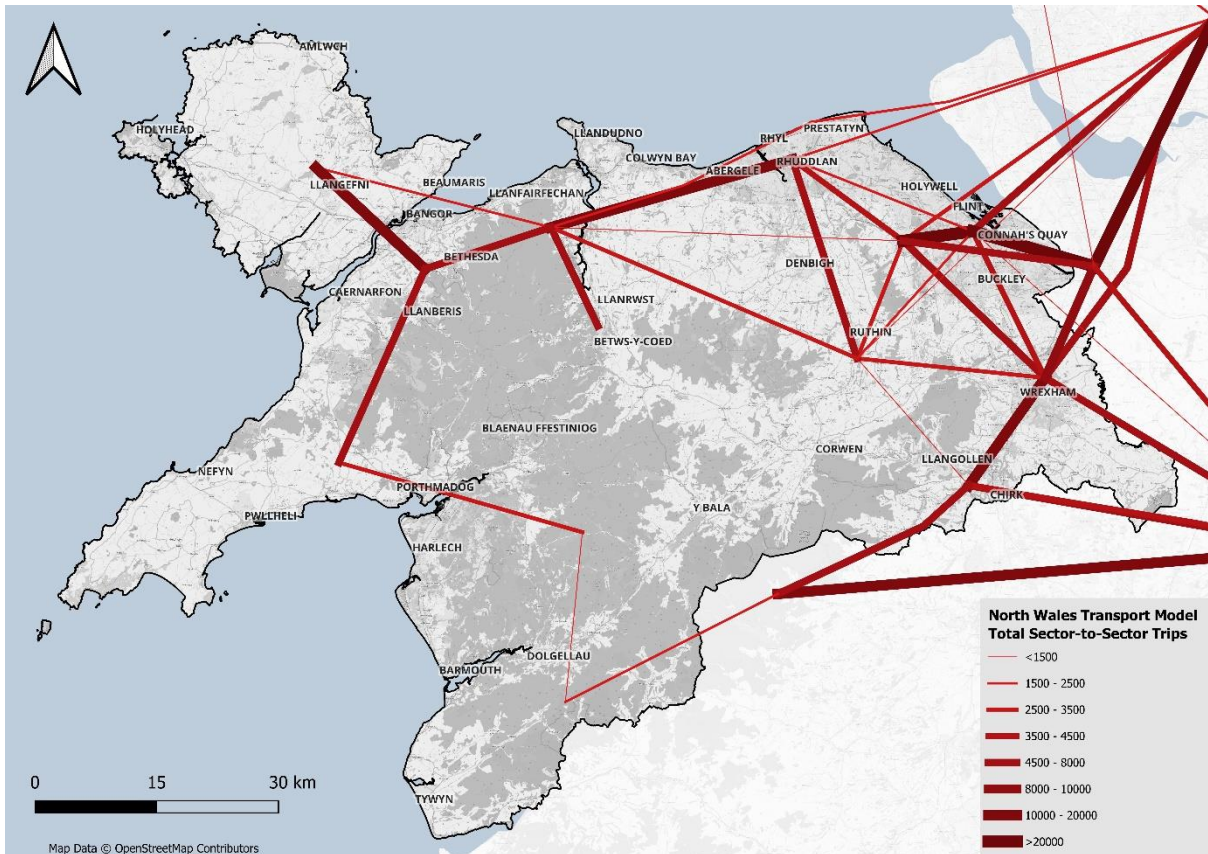
**Figure 2: Primary trip movements by sector – North Wales transport model**

Despite most journeys being local, mode share shows a heavy skew to private car use as follows:

- 80% of trips by car
- 4% of trips by cycle
- 7% of trips on public transport and
- 10% of trips on foot.

'Commuting' is greatest during the morning and significantly reduces during the day but increases again in the evening. Return commuting trips are commonly over a longer period than outbound commuting due to working hours and overlap with the school run in the morning.

With this knowledge of travel patterns, we then sought to understand current transport provision to understand how it may influence the mode share.

## 3.1　Roads
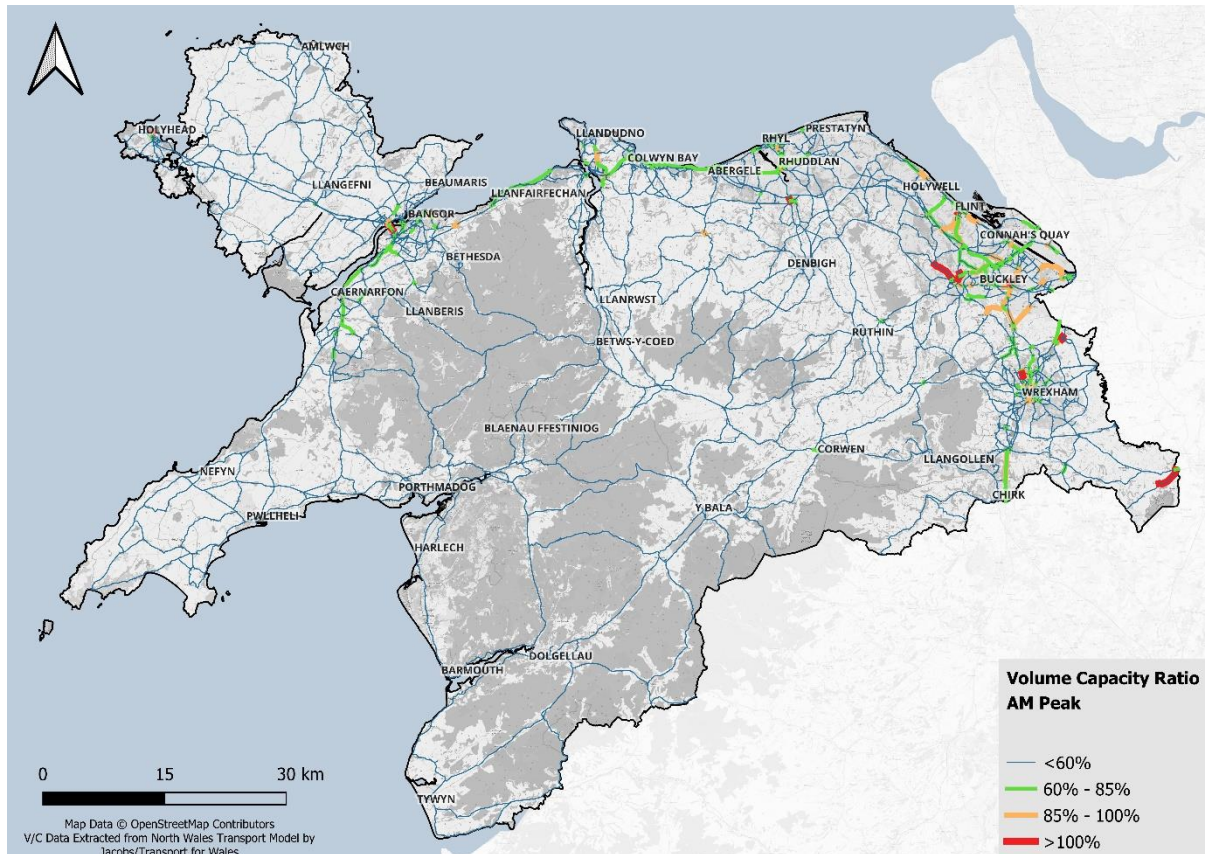


**Figure 3: Volume of road links against capacity – North Wales transport model**

The highway network in north Wales appears to generally function well, with relatively low levels of congestion, at most times of the day and year – but congestion does happen, notably on the A55 and the A483, and in the vicinity of the Menai Strait in the summer period (Figure 3). The lack of viable travel alternatives does not help with these instances of congestion and additionally, shortcomings in bus and rail provision and active travel networks encourage the car to be the default mode of choice for many journeys for those with access to a car.

We observe significant increases in the numbers of journeys made over the summer, with large numbers of visitors making trips into and around the region. On average across the region, there are one third more journeys in summer than in spring. This can lead to localised congestion that impacts the quality of life for people living locally.

## 3.2   Bus and rail

Although a large proportion of the population is located within walking distance of a bus stop or train station, the service provision is often poor. The standard measure used is up to 400m from a bus stop or 800m from a rail station. In several areas there are infrequent services and a lack of evening or weekend options which do not meet people's needs – notably for accessing employment and leisure activities.

After 7pm, only one third of north Wales residents have access to an hourly public transport service, and only one in thirty residents have access to a fifteen minute-frequency service. This is a significant deterrent to using public transport. This is illustrated in Figures 4-7 below.



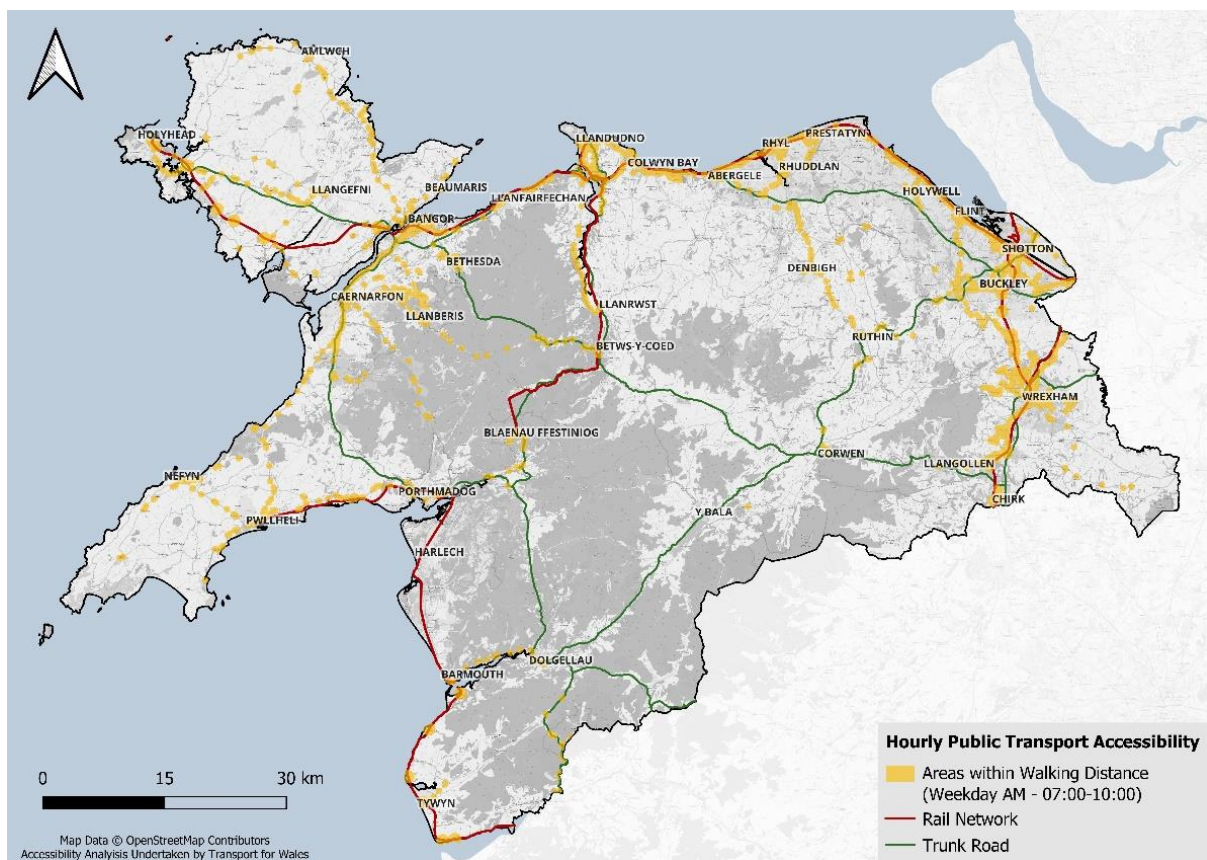**Figure 4: Access to hourly public transport services – weekdays 07:00-10:00**
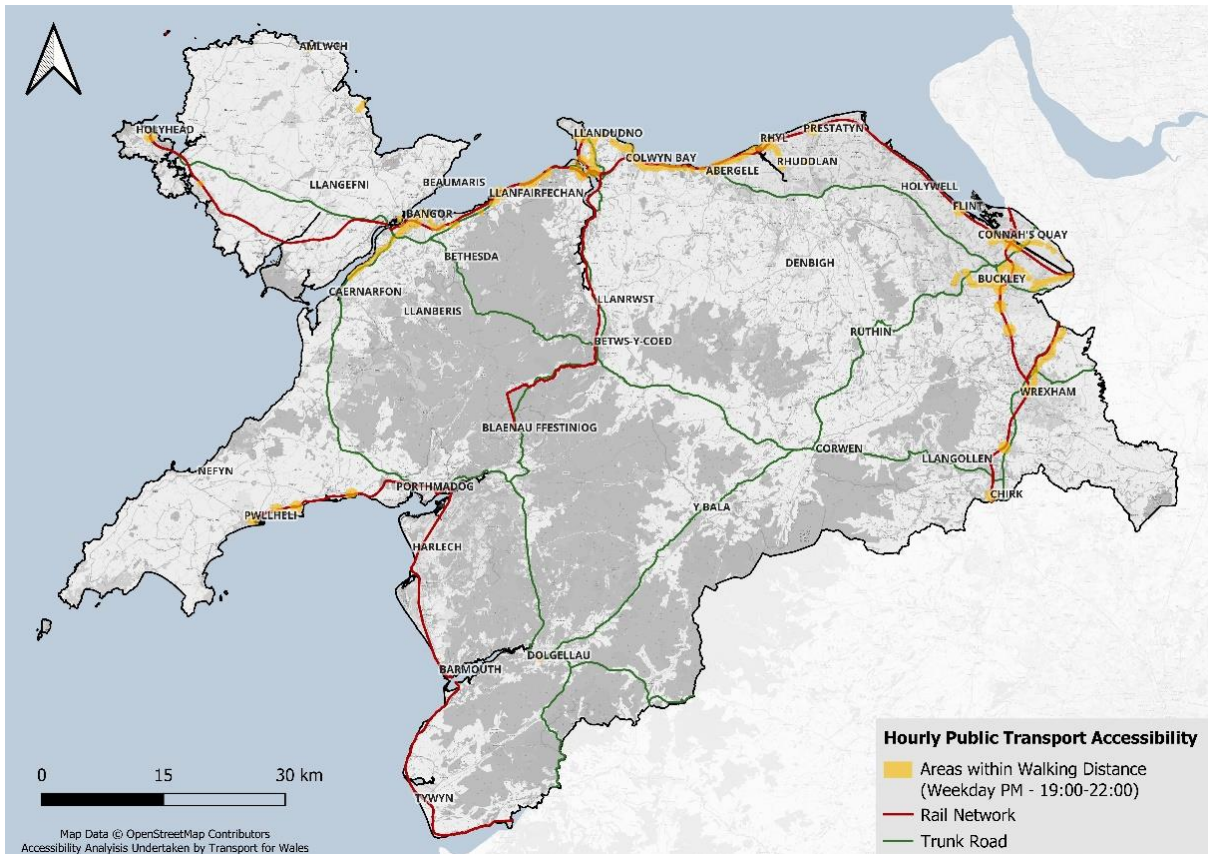
**Figure 5: Access to hourly public transport services – weekdays 19:00-22:00**
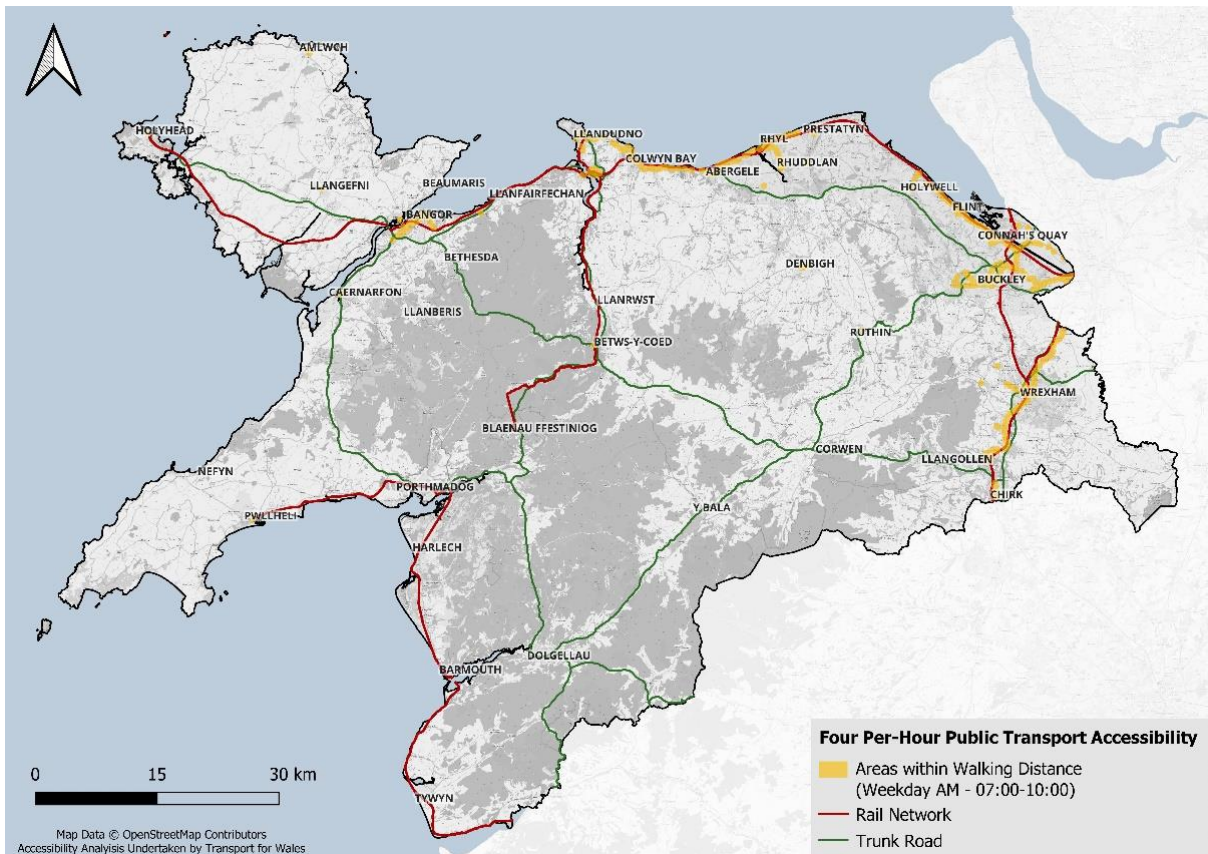


**Figure 6: Access to four-per-hour public transport services – weekdays 07:00-10:00**
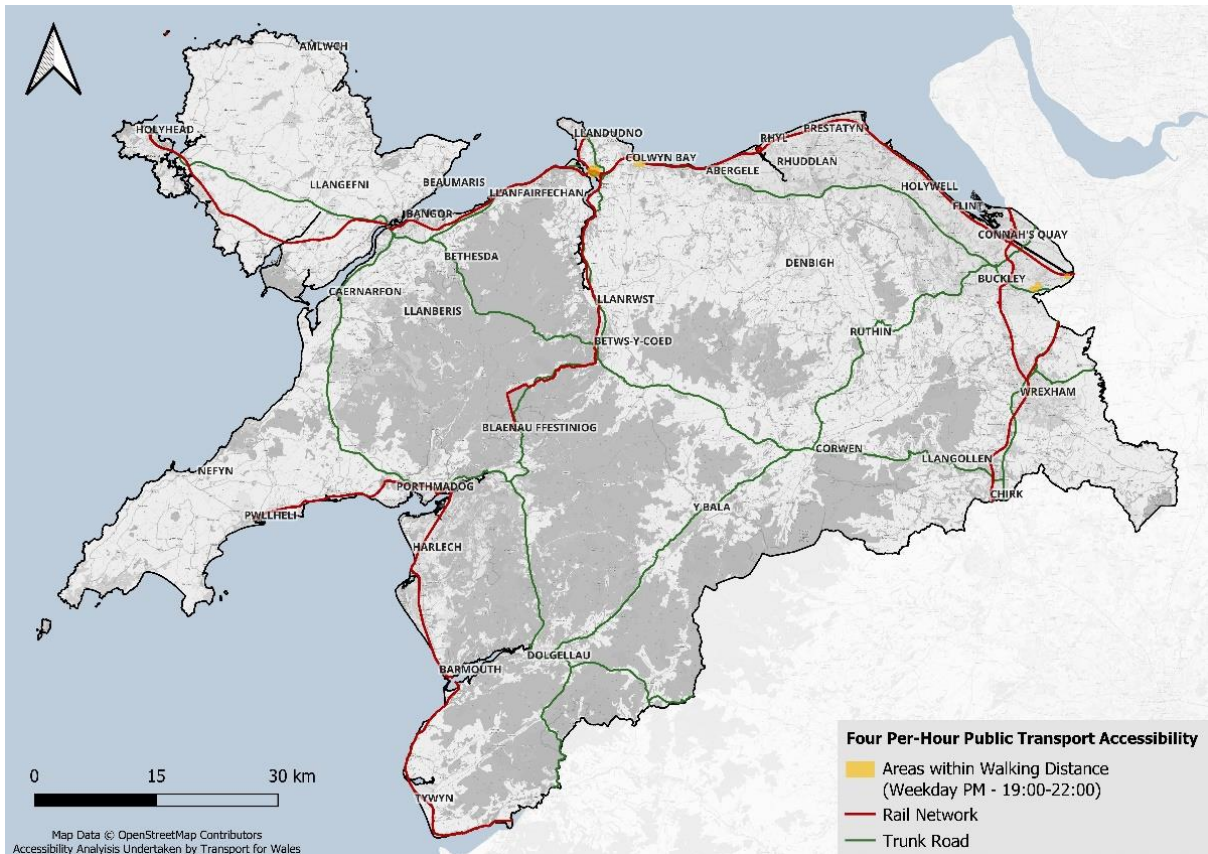
**Figure 7: Access to four-per-hour public transport services – weekdays 19:00-22:00**

Living near bus stops and stations is irrelevant when the service does not meet the needs of households or is unaffordable, and there may be many people who would use the bus or train with an improved service.

There are positive developments underway, such as a re-timetabled Sherpa'r Wyddfa network for accessing Eryri/ Snowdonia and the multi-operator 1bws ticket which allows cross-operator travel. However, there are many journeys by bus and rail that still require multiple tickets and/or long waits between 'connecting' services.

We can see that cost, as well as the lack of fully integrated timetabling and ticketing, acts as a barrier to using public transport.

The North Wales Main Line, lying on the north coast, was designed as a link to Ireland as well as providing services across the region. However the absence of intermediate stations and local services means the rail service does not always meet the needs of the current population for the purposes of daily work and leisure trips.

The services that currently use the North Wales Mainline continue via Chester to either Manchester, Crewe, the Midlands or South Wales. As a result, the frequencies of trains east of Chester are inconsistent - in some cases they are every 20 minutes, in others hourly.

The Borderlands Line lies between Wrexham Central Station and Bidston Station on the Wirral peninsula (for cross-platform connections to services to Liverpool Central). The line is used by both passenger and freight services, with regularly utilised rail freight access to and from the steel works at Deeside and Padeswood Cement Works. In November 2022, an independent review by the Office of Rail and Road allowed additional passenger services to run on the line to achieve a two train per hour service for most of the day.

The Conwy Valley line that runs between Llandudno and Blaenau Ffestiniog has some stations with very low usage and a service of only five trains a day.

We conclude that passenger rail services need to be improved to meet the current and future needs of the population. North Wales Metro plans, which can be found at [Transforming transport in North Wales | TfW](#), need to be prioritised to create the biggest changes quickly.

## 3.3   Active travel

Existing local authority walking and cycling routes vary in quality across the region with a mixture of basic networks in some settlements (e.g., Wrexham), routes based around schools and some longer distance, predominately leisure routes (e.g., Gwynedd's Lonydd Glas which uses old railway alignments). The quality of the routes varies partly as a function of their original design and partly as a function of the level of maintenance they receive. Many of the existing active travel routes are not up to current design standards as laid down in Active Travel Act Guidance.

Fewer than one quarter of the primary and secondary active travel routes in the north Wales region are classified as safe, attractive, comfortable, coherent, and direct enough to constitute adherence to active travel audit standards as based upon the Active Travel (Wales) Act Guidance 2021. Many routes do not reach these standards and act as a deterrent to people using active travel. Primary routes are key connections between residential areas and town centres or transport interchanges; and secondary routes are key connections to/from or between the primary routes and trip attractors such as colleges or employment areas).

Routes are often disjointed or incomplete and do not extend far enough to be useful to reach ultimate destinations. New users are less likely to make a change to these sustainable forms of transport because of both incomplete networks and poor quality of the network. There is also limited secure parking for bicycles in many areas.

Similarly for walking, pavements and road crossing options are sometimes poorly maintained – and in many rural areas do not exist. This makes walking for short journeys unattractive.

There is a clear ambition to improve active travel networks across the region. The recently developed Active Travel Network Maps (ATNMs) demonstrate how local authorities want to develop their walking and cycling networks. However, the slow pace of delivery has been a major limitation on progress because of very limited planning and design resources across the region.

# 4.   Three sub-regions

Different parts of north Wales have different characteristics, travel patterns, public transport service provision, active travel and other infrastructure. The geography of north Wales has shaped travel and there are three identifiable sub-regions in the west, the central coast and the east.

We found it helpful to consider the issues by sub-region. There is no intention to create clear delineations or definitions for each sub-region, but rather this approach allows for a focus on interventions that are most suitable and effective for the context of the area. For example, an intervention aimed at enabling more sustainable journeys in more heavily populated and urban areas may not be the best intervention for rural areas.

The three sub-regions are described below in more detail.

## 4.1   The west sub-region

The West comprises the local authority areas of Gwynedd and the Isle of Anglesey. These two authority areas are separated by the Menai Strait and connected by the Menai Bridge and Britannia Bridge (which also carries the North Wales Main Line). A significant proportion of the area's population is classed as rural (85%), which is the greatest proportion of the three sub-regions.

Main settlements on the Isle of Anglesey include Holyhead, Llangefni and Menai Bridge, with the port of Holyhead acting as a connection to Ireland. The most populated settlements in Gwynedd include Bangor, Caernarfon, Porthmadog and Pwllheli, and these are all located to the north of the authority area. Much of Gwynedd is also covered by the Eryri National Park Authority. The national park attracts significant numbers of people into the sub-region and has its own set of problems and potential solutions.

The sub-region is a destination for many visitors from England and tourism is an important part of the economy. This leads to some rural and semi-rural areas experiencing large increases in traffic volumes during seasonal peak periods, and these are times when the road infrastructure does not always cope well, leading to congestion and pollution for both residents and visitors.

The main travel movements are between Bangor, Caernarfon and Llandudno. Movements across Anglesey are fewer in number but centre around Holyhead and Llangefni, with movements to and from Bangor also being important.

The west sub-region has a comparable proportion of journeys under 5km (25-26%) compared to the regional average (26-29%), although the proportion of journeys under 15km (61-64%) is the lowest of the three sub-regions, reflecting the rural nature of much of the region.

### 4.1.1 Public transport

Access to public transport services is probably the worst of all the sub-regions, with only 62% of the population having access to hourly public transport services during the morning peak period, reducing to 18% during the weekday evenings (after 7pm), 44% on Saturdays (lowest of sub-regions), and 12% on Sundays.

For six days of the week there is not a single service that runs four times an hour after 7pm in the whole sub-region. Only 14% of the population have access to four services per hour during the weekday morning peak period, reducing to none during the weekday evenings (after 7pm), 9% on Saturdays, and none on Sundays.

The rail infrastructure does not join together some important settlements such as Caernarfon. Transferring to bus to complete your journey can significantly increase travel time.

The existing bus network does not create a realistic alternative to car journeys. There are 98 existing bus services in Gwynedd and 53 on the Isle of Anglesey. Bus services on the Isle of Anglesey are infrequent and have limited operating hours, although the operating hours in Gwynedd are the most extensive across the north Wales region.

The most popular rail station in north Wales is in this area - Bangor (over 600,000 entries and exits in 2019-20).

74% of all bus stops and railways stations in this sub-region are categorised as being in either the worst or second worst category, according to a PTAL (public transport accessibility level) assessment. A PTAL considers:

- Walking time from the point-of interest to the public transport access points;
- The reliability of the service modes available;
- The number of services available within the catchment; and
- The level of service at the public transport access points - i.e. average waiting time.

97% of journeys to and from the west sub-region are to other parts of the north Wales region, with only a small proportion (about 2%) of journeys crossing the English border.

### 4.1.2  Active travel

There is a planned active travel network of proposed primary and secondary routes in the region of 1,100km, of which just under a quarter can be classed as 'existing'.

Several longer distance routes exist within the region, many of these using old railway alignments, particularly within Gwynedd. However, the routes may join highways, or do not extend to ultimate destinations, and this detracts from the overall usability of the network.

## 4.2  The central sub-region

The central sub-region consists of the Denbighshire and Conwy local authority areas. There is an urbanised coastal strip to the north with major settlements consisting of Prestatyn, Rhyl, Kinmel Bay, Towyn, Colwyn Bay, Rhos-on-Sea, Abergele, Llandudno, Llandudno Junction and Conwy. The south of the sub-region is predominantly more rural, with centres roughly following the Conwy Valley (Glan Conwy, Llanrwst and Betws-y-Coed), Vale of Clwyd (St Asaph, Denbigh, Ruthin) and a section of the Dee Valley (Corwen and Llangollen). 40% of the population in the central sub-region is classified as rural, which is significantly lower than the west sub-region.

This area is socially diverse, and it has the largest proportion of people aged 65 or above compared to the rest of north Wales. It is also home to five of the 20 wards that were identified as the most deprived wards in Wales by the latest Welsh Index of Multiple Deprivation (2019) – Rhyl West 2 (Ranked 1), Rhyl West 1 (Ranked 2), Rhyl West 3 (Ranked 11), Rhyl South West 2 (Ranked 19) and Glyn (Conwy) (Ranked 20).

96% of the central sub-region's journey destinations are within north Wales, with only approximately 4% of journeys crossing the English border. The main transport movements in this area are between Llandudno, Llandudno Junction, Conwy and Colwyn Bay. Further east within the sub-region, there are a greater number of trips between the central and east sub-regions, including to and from Shotton and Deeside.

Of the three sub-regions, the central sub-region has the largest proportion of journeys under 5km (29-32%), and 67-73% of journeys under 15km, which are a slightly lower proportions than in the east sub-region.

This area is home to large caravan parks as well as the Clwydian Range and Dee Valley area of outstanding natural beauty, which generate significant numbers of visitor trips.

### 4.2.1 Public transport

There are 117 bus services in Denbighshire and only 57 in Conwy. The frequency and operating hours of these services are low and restricted with short average weekly operating hours.

Many of the railway stations with the lowest usage in north Wales are in Conwy and are on the Conwy Valley Line.

Conversely, three of the five busiest stations in north Wales are in the central sub-region along the North Wales main line, which has more frequent services serving the populated coastal strip.

The proportion of journeys to work by car (81%) is broadly comparable with the north Wales regional average.

74% of all bus stops and railway stations across the central sub-region are categorised as either the worst or second worst category, according to the PTAL (public transport accessibility level) assessment.

71% of the local population have access to hourly public transport services during the morning peak period, reducing to 42% during the weekday evenings (after 7pm), which is the largest reduction of the three sub-regions, and 63% on Saturdays, and 26% on Sundays (again, the largest reduction of the sub-regions). Only 37% of the population have access to service frequencies of four or more per hour during weekday morning peak period, reducing to 5% during the weekday evenings (after 7 pm), 26% on Saturdays, and none on Sundays.

### 4.2.2 Active travel

The proposed active travel network of primary and secondary routes in the region is over 900 km in length, of which approximately 30% is classed as 'existing'.

Key longer distance routes include parts of the National Cycle Network Route 5 along the Northern Coast, Route 84 between Rhyl and St Asaph, Route 85 in the Dee Valley and connections along a former railway alignment between Prestatyn and Dyserth.

Whilst these routes attract a high percentage of leisure trips, they also connect settlements that are relatively close together, and they are therefore also used for everyday journeys.

Isolated sections along these routes require cyclists re-joining highways to either continue along the route or to reach their destinations, which reduces their overall attractiveness.

## 4.3 The east sub-region

The east sub-region consists of the Flintshire and Wrexham local authority areas. It comprises an urbanised strip adjacent to the River Dee (west of Chester) and a large population density surrounding the City of Wrexham. Rural areas prevail in North and West Flintshire and the far edges of the county boundaries of Wrexham, although the sub-region has the lowest proportion of people living in rural areas (32%) of the three sub-regions.

The east sub-region is home to more than 40% of North Wales' population. It is more densely populated and has a lower age profile than the rest of North Wales. More people live in urban areas.

Manufacturing industries dominate and make up 30% of all employers – most jobs in manufacturing cannot be done at home, and workers have to be able to travel to a place of work.

This sub-region has strong connections to North West England, with a larger daily Wales-to-England flow than along the M4 corridor. Being adjacent to the border means this sub-region has different travel patterns in terms of destinations, with a lot more cross-border travel. 18% of journeys from the eastern sub-region are cross-border, with the North West of England including Merseyside, Warrington and Liverpool as a destination accounting for 15% of all journeys. The main transport movements are between Wrexham, Deeside, Mold and Chester.

While outside of Wales, Chester's proximity is important for entry into and exit from North Wales – and for the east sub-region. Therefore, suitable transport infrastructure and services to Chester are an important consideration.

The estimated proportion of journeys under 5km in the east sub-region (25-27%) are broadly comparable with the regional average (26-29%), although it is noted that the total number of journeys under 15km (70-74%) are slightly higher than the regional average (67-71%).

Journeys for work are greater in number during the morning in the east sub-region compared to the North Wales average. The sub-region has the largest proportion of journeys by car (84%) of the three sub-regions but perhaps also the best public transport provision.

Business and industrial parks are important parts of the sub region's economy, but public transport and active travel options to these employment centres are wanting – not least due to how these places have been designed with vehicles at their centre.

In addition to improving choices for travel to industrial centres, we are interested in how car sharing and better workplace travel planning could contribute to more options for people to travel to their place of work.

### 4.3.1 Public transport

73% of the population have access to hourly public transport services during the morning peak period (the largest proportion of all the sub-regions), reducing to 27% during the weekday evenings (after 7 pm), 63% on Saturdays, and 0% on Sundays (the lowest proportion of all the sub-regions). Only 40% of the population have access to service frequencies of four per hour or more during the weekday morning peak period (the largest proportion of all the sub-regions), reducing to 2% during the weekday evenings (after 7 pm), 30% on Saturdays, and none on Sundays.

Wrexham General Rail Station is in the east sub-region and is the third most well-used station in north Wales with 501,000 entries and exits in 2019-20.

According to the PTAL (public transport accessibility level) assessment, 54% of all bus stops and railway stations across the east sub-region are categorised as either the worst or second worst category, which is the lowest proportion of the three sub-regions.

### 4.3.2  Active travel

The proposed active travel network of primary and secondary routes in the sub-region is over 1,100 km in length, of which only about 20% is classed as 'existing'. Key existing routes include parts of National Cycle Network Route 5 between Chester, Connah's Quay and the North Wales Coast along the Dee Estuary and into the Deeside Industrial Park, which also connects through to the Wirral. Isolated sections along these routes require cyclists to re-join highways to either continue the route or to reach their ultimate destinations, which reduces their overall attractiveness. High quality pedestrian and cycling infrastructure is limited outside of these key existing routes.

# 5.  Visitor and tourism travel

Tourism is an important contributor to the economy of north Wales and in the spring and summer there are large increases in journeys made across the network.

The region receives the highest share of visits compared to other regions in Wales. North Wales saw an 8 per cent increase in the annual average volume of overnight domestic (within Great Britain) trips to 3.7 million between 2016-2018 and 2017-2019. Of the top 20 free and paid-for attractions in Wales in 2019 (pre-covid), 10 were attractions in North Wales. 17.4 million visits were made to attractions in Wales which provided data in 2021 as found in [Visits to Tourist Attractions in Wales 2021 (gov.wales).](Visits to Tourist Attractions in Wales 2021 (gov.wales).)

The three western local authority areas of Conwy, Ynys Mon and Gwynedd have significant increases compared with the rest of the UK.

Key tourism sites within North Wales are generally located in rural or coastal locations. Therefore, localised congestion is predominantly an issue for small towns, villages, and countryside and coastal locations. Many of these locations are significant distances from major, high-capacity roads and key routes will often include narrow rural roads and villages where large vehicles can have difficulties in passing, and large seasonal traffic flows can result in congestion.

Some major locations also suffer from illegal parking due to excess demand for limited facilities.

However, as shown in traffic flow data, tourism also has impacts on major transport corridors and gateways, particularly during spring and summer months, most notably, July and August.

We can see that there are varying issues in different locations – for example the issues in Eryri National Park are different to issues on the coast where traffic to the port of Holyhead, as well as longer stays and change over times, cause peaks of traffic on the A55.

The deficiencies we have identified in the transport system across the region mean that, when there are times of increased usage, the system is put under pressure, with rises in traffic causing problems– resulting in further reliance on the car over other modes. In addition, the location of tourism sites and lack of public transport options to get to and from these locations result in significant reliance on private car travel.

Tourism attracts a diverse range of socio-economic groups to North Wales, who travel to and within the area for a range of different activities. Transport infrastructure and services needs to be improved - especially for those who do not own a car.

Any improvements we touch upon in this report, such as improved bus frequencies and hours of operation, can give visitors to the region more choice in how they travel when in north Wales, along with a wider choice of destinations.

There are several innovations that have occurred in recent times in relation to tourism travel. For example, Tourism Hubs are specific locations where tourists can access sustainable transport modes, tourist information and other key services. Hubs can be run by community-led non-profit organisations, where any profits from their operations may be used in the community during the off-peak months. As the hubs offer sustainable modes of transport (often cycles and e-cycles), local areas can facilitate seasonal peaks with less impact on local networks. Tourism hubs need to be able to control parking charges and traffic as well as public active transport incentives.

For example, in Scotland, the Loch Ness Hub is a community-owned hub which integrates an information centre with a baggage shuttle service for walkers, e-cycle hire, coach stop and tickets for local attractions.

We have noted the current Welsh Government consultation for a discretionary visitor levy to be operated by local authorities and will follow its development. While the consultation makes clear that there would be a legal requirement that any funds raised from the levy must be used to fund local authority expenditure, we would want to understand whether there may be further limitations placed on local authorities. The opportunity of improving local transport infrastructure and services would appear to be an important possible area for revenue spend. Transport networks extend across local authority boundaries, and this would then require inter-authority co-operation.

We would like to consider further whether there are differences in travel behaviour between day trippers and those making longer stays, to understand whether there are different propensities to use, and requirements for, for example, public transport.

New attractions should be planned and built that facilitate travel by sustainable means. Options may include, for example, shuttle buses, park and ride services, and more comprehensive active travel networks, and cycle or e-cycle hire.

Transport for Wales has a 2-for-1 scheme with CADW as shown in [2-FOR-1 Entry Offer with Transport for Wales | Cadw (gov.wales)](#) to encourage visitors to travel sustainably. It would be beneficial to consider making more offers which combined travel costs and entrance fee for a visitor attraction.

# 6.    Problems and challenges

There is a current lack of attractive or realistic sustainable transport alternatives to the private vehicle for journeys by residents, workers, and visitors in North Wales. This is contributing towards dependency on private vehicles and limiting social, economic and cultural connections.

National, regional and local policies are broadly aligned to with aspirations that seek to realise a sustainable integrated transport system in North Wales. However, there are instances where practice on the ground is at odds with these policies with 'gaps' between otherwise well-intentioned policies that potentially contradict or challenge these.

Our work to date has found there are generally reasonably good conditions for travel by car, including relatively low levels of congestion, while noting that localised and seasonal congestion does occur.

Car users also benefit from often low-priced or free car parking, with many destinations set up for car users, such as out-of-town retail facilities. There are some bottlenecks on the highway network that cause particularly high levels of congestion. Congestion can also occur because of road closures, such as the current Menai Bridge closure.

Car ownership in North Wales is generally high, with around 4 in 5 households having access to a car according to Census 2011 figures. Car ownership is lower in urban areas as illustrated in Figure 8. Census 2021 figures will be released in early 2023 and considered.
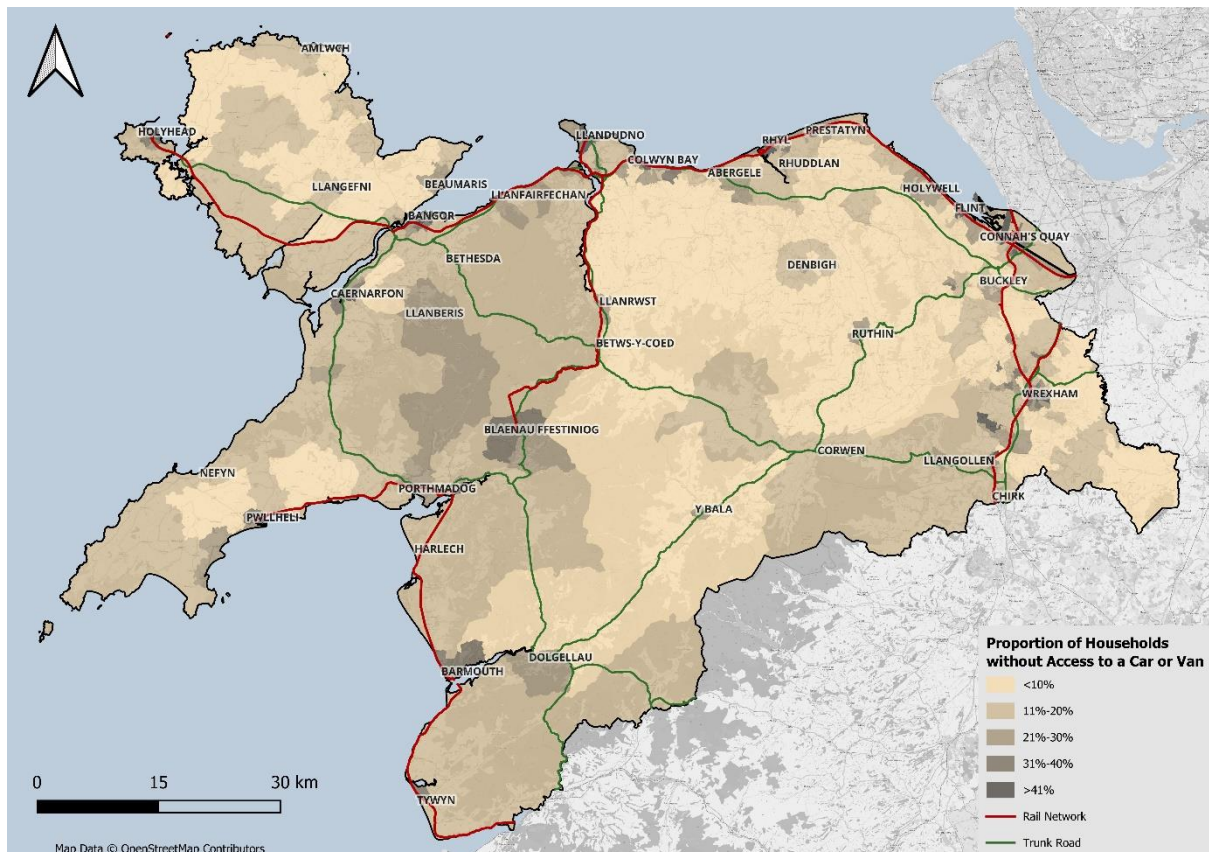


**Figure 8: % of households without access to a car or van**

Therefore public transport is not operating at the frequency or operational hours to make it an attractive alternative to car. This is true for both residents and visitors to North Wales. Additionally, integration between different transport modes, including physical interchange locations, timetabling and ticketing, prevent efficient multi-modal journeys. Importantly, public transport is not affordable for some, reducing access to employment opportunities.

Active travel networks are under-developed and disjointed and often return users to the carriageway in areas where separated infrastructure is needed the most, while ordinary pavements are sometimes not well maintained, and walking for short journeys is hampered by parking on pavements and a lack of convenient road crossings.

The levels of car ownership, ease of use and (historically) relatively cheap cost of the car, coupled with public transport and active travel networks that are not able to offer affordable, attractive journeys for many potential users, has led to a high reliance on the car.

This dominating use of the car not only makes for significant environmental impacts, but also limits choice and opportunities for the many individuals who do not have access to a car.

While the car will remain a significant mode choice for many journeys in North Wales, there is the opportunity for many more trips to be made using the train, bus and active travel modes but only if networks, frequencies and operating hours and integration are substantially improved.

We have seen some of the North Wales Metro plans in development by Transport for Wales and the local authorities and conclude that if realised, these would address many of the problems we have found. However, we understand there are real challenges to delivering these, including a complex governance and ownership landscape and funding challenges.

# 7.   Opportunities

As we have noted, North Wales has one of the largest dependencies on the motor car of any region of England and Wales and low numbers of people using bus or rail services.  These figures reflect the current levels of transport services that are available and the cost of using them.

To make any significant reduction in car journeys will require a major shift in the public transport services that are available so that they are more competitive with the car with respect to convenience, frequency, price and the time taken for the journey. This will require more than marginal changes.

In the following section we look at some of the areas where we see potential for significant change and in our final report, we will be aiming to make specific suggestions of the changes we judge are necessary if we are to achieve the modal shift we wish to see.

## 7.1 Rail

Where there are existing railway lines, train is likely to be the most attractive alternative to the car because of its ability to move high volumes of people at relative speed. Transport for Wales (TfW) is working to deliver a series of improvements to transport in North Wales under the Welsh Government's North Wales Metro Programme. The programme aims to make it easier and faster to travel across North Wales and better connected to North-West England. The Programme will also improve connectivity between North Wales and key destinations within the UK with links to HS2 and Northern Powerhouse Rail. These include:

- Increasing services on the Borderlands Line between Wrexham and Bidston to two trains per hour
- Enhancing capacity at Chester Station to enable more cross border trains
- A new hourly train service between Liverpool and Llandudno
- Extension of the current Manchester Airport to Llandudno service to Bangor
- A two-hourly Liverpool to Cardiff train service
- An hourly Shrewsbury to Liverpool service
- Phased rail frequency improvements on the North Wales Main Line with the vision for four all-stopper and one express passenger service per hour
- Direct rail connectivity between Wrexham and Liverpool
- New rolling stock or refurbished rolling stock to improve the customer experience on rail across North Wales
- New station development at Deeside, improved station at Shotton

For rail, these enhancements and improvements appear to us to be a priority:

- Phase One of North Wales Mainline, providing enhanced services and improved connection to HS2
- Chester capacity improvements, providing more through trains and less need to interchange for Welsh passengers
- Borderlands line – direct connectivity between Wrexham and Liverpool, opening labour market connectivity

- Deeside new station, providing access into Deeside Industrial Park

These priority interventions will provide improved public transport to key employment and development sites and the best strategic connectivity between Wales and Liverpool City Region and HS2 at Crewe.

There is some freight traffic on the rail network in north Wales and there have been some new flows on rail recently. Rail strategies and enhancements for north Wales will need to allow for and actively support current and future expanded rail freight flows.

Rail infrastructure and franchising in Wales remains the responsibility of the Secretary of State for Transport in the UK Government. Welsh Government and Transport for Wales are working with Network Rail and the UK Government to improve the wider rail infrastructure including developing new stations and reopening stations within the region. The Commission supports the Welsh Government's aim for a stronger voice in rail investment decisions that affect Wales, and a fair funding settlement.

We consider it likely we will provide our full backing to large elements of the North Wales Metro programme, but with some assessment of priorities, as well as potentially more far-reaching proposals and recommendations to deliver deeper and faster change for the benefit of the people of North Wales.

## 7.2    Bus

The Welsh Government's vision for buses, outlined in Llwybr Newydd and Bws Cymru, is to provide 'A stable and coherent network of bus services that are fully integrated with other modes of public transport, that are reliable, affordable, flexible, easy to use, low-carbon and that encourage more people to use the bus rather than their cars.'

The Commission supports this vision, and we are also keen to see how the Welsh Government's white paper to plan buses as a public service for Wales will progress.

The bus network has a key role to play in moving people around our settlements within the region, connecting people to the rail network on the North Wales coast, Cambrian Coast, Conwy Valley, and the east sub-region, and providing a flexible, local service.

The Commission has determined that improving bus networks and services is the key to improving transport for people living in rural areas not connected to the rail network as well as towns. The Commission would also like to prioritise delivery of proof-of-concept schemes that demonstrate better handling of key rural-to-rural connections.

Where a scheduled service is not viable, demand responsive transport like the Fflecsi (demand responsive) service should be considered to provide a more flexible and adaptable service meeting specific community needs.

Transport for Wales is already working in partnership with the local authorities and operators in the region to redefine the bus network to better use resources.

We think that timetables should be coordinated and depart at regular intervals, e.g., at the same number of minutes past each hour. Hours of operation should be sufficiently long to give people confidence that there will be a comprehensive service whenever it is needed to foster a culture of bus use.

Key bus corridors within the urban centres of the sub-regions will require appropriate infrastructure such as bus lanes and bus priority measures to ensure reliable journeys and promote the priority of buses over the car.

We support the progress the Welsh Government is making regarding new bus legislation that will give the public sector more control over local bus services. This should also set standards so that passengers know what they can expect from bus services.

The bus and rail systems must interact better to provide a greater range and reach of services. We will therefore focus on how each mode can be best integrated to provide a flexible transport network.

We support the 1bws ticket, which provides access to 27 bus operators and nearly 200 bus routes across north Wales, and we would like to see if it could be expanded to other transport modes.

We will give more consideration to wider integrated ticketing, coordinated timetables, and efficient interchanges between modes. The 'London model' of integrated ticketing across rail and bus modes with seamless connectivity across operators should be the goal, with full tap on/tap off ticketing. Some of this is already happening in Cornwall – [Cornwall reduced bus fares save passengers £1.2m - BBC News](#) – which as a mainly rural area with small towns and high levels of tourism has some similarities with north Wales.

This approach will require new legislation, and Welsh Government is backing a bus franchising model which would specify the services and how they will run, including routes, vehicle standards, timetables, fares, branding, passenger information and ticketing. However, it also will require significant investment in new technology.

The Commission understands that for many parts of the region, rail improvements will not make a significant impact and is keen to see development of a more expansive and accessible bus network with improved frequencies and longer operating hours. We would also support investment in specific public transport routes and bus priority measures to support congested routes (where feasible).

## 7.3   Active travel

Llwybr Newydd suggests that walking and cycling should become the normal choice for shorter journeys, promoting benefits to health, the environment and the economy.

Cars are often the preferred form of travel in North Wales and are often currently used in rural areas where there are no reasonable alternatives available. However, in some areas, cars are being used for short journeys when walking, cycling or public transport would be cleaner and healthier, and residents could travel on foot or by bike if safe, comprehensive, comfortable and attractive routes were available.

The Commission has identified that a high proportion of trips are very short journeys, but levels of active travel remain low. As nearly a third of all journeys are less than 5km in north Wales, it would be natural to think that a lot of these journeys could be made on foot or by cycle. These include escort trips to school, short journeys for shopping and local services and the 'first mile' and 'last mile' of public transport trips.

The perceived (and actual) safety of routes for walking and cycling is a significant barrier for many especially in rural areas, where there is no separate infrastructure available. Country roads often do not have footways, the carriageway is subject to the national speed limit (60 mph on a single carriageway road) and street lighting is insufficient.

More people would walk and cycle if the infrastructure was comprehensive (by providing connections from where people live to where they want to go such as work, shopping, leisure and education, comfortable and attractive, hence also making it safe. The infrastructure also needs to be well-maintained.

We also acknowledge that nearly half of all trips within North Wales are between 5 and 15km. Although journeys over these distances are not always suitable for people to walk and cycle, we consider the role and availability of electric cycles can significantly promote the use of cycling as a mode of choice for these slightly longer journeys.

Consideration should also be given to the wider use of, access to, and funding of electric cycle schemes, where appropriate, within the region.

We think walking and cycling networks and facilities should be improved to support integration with key public transport interchanges and to give better access to major employment and retail sites. This would help to replace single occupancy car trips for short-distance journeys. This would include improving cycle parking facilities for public use at stations and interchanges, town, and retails centres.

The management and maintenance of active travel routes should be given higher priority in the local authorities and be seen as an integral part of the local transport network and solutions to travel problems. Routes and networks should have a high-quality maintenance regime that keeps them attractive and safe for existing and new users.

Future active travel networks should be designed and constructed to Welsh Government's Active Travel Act Guidance standards as a minimum and be supported by Active Travel Fund investment.

Having considered the information available, we judge that the development of better quality, separate infrastructure for active travel will encourage more people to walk and cycle for short journeys. There should also be better support for safety and ongoing maintenance of active travel networks and help for local authorities, whose capacity to deliver may have been weakened by funding constraints.

Routes that are well integrated to key destinations and interchanges will be better used, and those that go from where people live to where they need to go as opposed to leisure routes should be prioritised.

We fully support the proposals outlined within the Active Travel Network Maps for north Wales and look forward to seeing them delivered. Higher impact urban routes should be prioritised to provide facilities for as many potential users as possible, though we also understand the need to connect outlying communities to their key local centre.

## 7.4   Reducing the impact of travel

The Covid-19 pandemic added to the pre-existing trend of more people working from home, potentially reducing car travel at peak times and associated congestion. However, many employees cannot work from home full time and still require improved affordable and sustainable commuting options.

Town and city centres may struggle because more people are working from home. The Welsh Government, in partnership with local authorities through Transforming Towns Agenda, are considering how towns can be supported by, for example, using public spaces to maximise active travel opportunities, improving digital connectivity and localising service delivery, while reviewing the relative costs of private and public transport.

Newer travel options such as car clubs, car sharing, cargo cycles, e-scooters and e-cycles, and effective workplace travel planning should be considered.

## 7.5   Parking

There is considerable scope for reviewing the effect of parking policy on the availability and costs charged for parking in many different locations, such as:

- In tourist areas

- In town and city centres where free parking is provided to encourage custom; and

- In new housing developments.

We consider that the provision and charging for parking is an important choice determiner and will complement the measures to attract people on to improved public transport services.

There are examples of revenue from increased parking charges being used to improve public and active transport (e.g., the Sherpa'r Wyddfa service) and we would like to investigate this approach to see if it can be applied more widely. We will also consider the potential for Workplace Parking Levies.

## 7.6 Future funding

Financial constraints will always limit the progress that can be made in improving transport and making it more sustainable. This is a national issue that impacts locally.

Over time, revenues from fuel duty will drop and alternative forms of revenue will need to be found, both in central and local government as there is a need to find funding for improved public transport and active travel. There are several options for creating new funding streams for transport that are being widely considered.

Road User Charging is one of those options which is being considered by UK Government, and Welsh Government will need to consider how that would apply in Wales at national, regional and local levels.

We will consider ways of encouraging people who have good sustainable travel options available to use them; for example, by creating incentives such as reducing fares and free or subsidised use of cycles, as well as potentially increasing charges for car use – including road user charging, with all revenue raised ring-fenced for improving active and public transport and/or reducing fares.

Workplace Parking Levies charge employers and education providers for the number of parking spaces used by employees or students. It can either be absorbed by the employer or passed on to space users. The aim is to encourage more commuters to use alternative means of transport rather than their cars. By law, the revenue raised through the WPL must be put back into improving local transport.

Nottingham introduced a workplace parking levy in 2012, with employers that provide more than ten liable spaces charged £458 a year for each space (2022 figures). The levy has raised more than £83 million.

Nottingham has high public transport use rates and has experienced a significant fall in carbon emissions.

## 7.7    Land use planning

We will consider whether planning policy needs to be changed to ensure integrated regional land use planning can take place in North Wales, particularly from a transport perspective. This may be necessary to ensure we do not further build-in car dependence into new developments. As part of this, we will consider whether developments can be better focused on places with good transport links, how to offer better sustainable transport options for all new developments, and how local services, accessible by walking or cycling, can be provided.

The Commission would like to see more constructive challenge and support from Welsh Government to local authorities, noting that planning and parking decisions at a local level often undermine national policy; for example, offering free town centre car parking, approving expansion of parking provision in out-of-town developments, and numbers of parking spaces in new housing developments.

We can see that there are several developments across the region built around the car which have undermined the traditional town centre High Street. This relates to retail and commercial developments, but also to housing.

For example, Technical Advice Note (TAN) 18 ([https://gov.wales/technical-advice-note-tan-18-transport](https://gov.wales/technical-advice-note-tan-18-transport)), which dates from 2007, and the way it is interpreted in practice on the ground, adds to an entrenched car dependence and makes it more difficult to provide high quality active travel and public transport access to new commercial and residential developments.

We will also consider whether Welsh Government could create sustainable development exemplars on sites it owns or can influence. We would also like to see more support for Local Authorities and developers for behaviour change work.

## 7.8    UK Government

The work of the Union Connectivity Review has agreed with the previous work of the South East Wales Transport Commission and the need for the sustainable transport hierarchy as laid out in the Wales Transport Strategy. This approach is being echoed in the work of the North Wales Transport Commission.

Several Levelling Up funding bids are being submitted to the UK government by North Wales local authorities. The Commission has noted the significant daily movements of people by car along the Wrexham / Chester to Deeside corridor for the purpose of employment and is of the view that any Levelling Up proposals that offer improved public transport infrastructure in the region – leading to substantial reductions in private car use – are to be welcomed.

# 8.    Next steps

As our work continues, we will seek to develop both wider and more specific proposals, which build on, and add to, those schemes already planned, where they support the overall remit of the commission.  We consider it likely we will provide our full backing to large elements of the North Wales Metro programme but with some assessment of priorities as well as potentially more far-reaching proposals and recommendations to deliver deeper or faster change for the benefit of the people of North Wales.

We have not looked at all aspects of transport in North Wales yet. Our ongoing programme of work to shape our recommendations includes looking at:

- The potential new and emerging technologies have to affect and improve transport.
- The impact of climate change and the need to protect transport networks against future threats.
- International best practice and how it might be applied in north Wales
- What initiatives might have the best success in getting people to travel sustainably.
- The role of freight and ports in north Wales.

This is our progress so far and we want to know if these thoughts seem right to you, and whether you have anything you would like to tell us about travel and transport provision in North Wales. We would also like to know if you think the opportunities we have identified will make travel in north Wales - and the lives of the people who live there - better.

In the coming months, we will be talking to stakeholders to refine what our recommendations to Welsh Government should be. We hope that these will be published in spring 2023, with our final report due in the summer.

## Staying in touch

Information on the Commission's work is available online at [North Wales Transport Commission | GOV.WALES](#)

We welcome ideas and comments. You can contact us by email or post at

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