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TRANSPORTCOMMISSION
DE-DDWYRAIN CYMRU / SOUTH EAST WALES

Engagement Background

JULY 2020

Mae'r ddogfen yma hefyd ar gael yn Gymraeg.
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INTRODUCTION

1.1 This technical background report supports the engagement findings made in *Emerging Conclusions.*

1.2 It records how the Commission has sought to listen to and learn from the experiences and transport choices of people who live, work and travel in South East Wales.

SUMMARY OF STAKEHOLDER ENGAGEMENT ACTIVITIES

2.1 A programme of engagement activities was carried out by the Commission between October 2019 and March 2020. These activities were designed to engage with as many stakeholders as possible within the timescales available using a variety of engagement techniques:

- bilateral meetings with key stakeholders
- discussions with elected members
- multilateral strategic stakeholder workshops
- digital public engagement platform collecting online comments and ideas from the general public across the South East Wales region – branded as 'Have your Say'
- face-to-face Travel to Work surveys at key employment sites
- online Travel to Work Survey for employees at key workplaces across South East Wales and South West England

GENERAL FINDINGS

3.1 Qualitative and quantitative feedback from engagement has provided the Commission with a richer insight into travel patterns and behaviours. It suggests there are a number of contributory factors to the dominance of the car within the region. These include deficiencies in the public transport system, economic and spatial policies, working practices and lifestyle patterns.

3.2 Data collated from the Commission's 'Have your Say' digital public engagement platform and the commuter-focussed travel to work survey, clearly demonstrates the dominance of the car as the main mode of travel across the South East Wales region. Issues related to travelling by car were also the most commonly cited transport problem and the most requested transport-related improvement. Feedback from the stakeholder workshops described a negative road user experience associated with the M4. Issues cited include frequent closures, long diversions, lack of a hard shoulder, poor road surfacing, congestion, delays, slow journey times and slow response times to incidents.

3.3 Crucially, alternatives to using the M4 are not perceived to be any better and pose too many barriers. For most, despite the congestion and delays involved in driving, public transport is still less convenient, less reliable, less quick and less attractive. Driving is also perceived to be cheaper, particularly for commuting journeys as many employees are afforded free parking. It is a similar story for logistics, where moving freight is also easier and often cheaper by road than rail. Active travel is perceived to be dangerous without segregated infrastructure and inappropriate for longer distance travel.

3.4 Data sets and workshop feedback show that there is a clear willingness to use the car less and use sustainable modes more so long as barriers to using them are removed and improvements are made. In terms of what transport improvements people wanted to see, better public transport (more frequent services) came closely behind the need to improve local roads in terms of future interventions.

3.5 From the 'Have your Say' platform, 65% of those who engaged with the question "*would you consider using public transport, walking or cycling for some journeys that you currently make by car?"* answered positively with an additional 15% answering tentatively with 'maybe.' Around 40% of car drivers completing the Travel to Work survey said they would be willing to try other options such as walking, cycling, public transport or car sharing to travel to work some of the time. Just over half of survey respondents said they would be willing to use Park & Ride as part of their daily commute if they considered it to have a good service and good access to their employment site.

3.6 Overall, positive feedback from the public and stakeholder engagement suggests that there is a potential market shift for public transport that can be developed, accompanied by a shift to active modes for some or all of a journey.

3.7 However, we note that nearly 70% of commuters confirmed they presently experience barriers that make it difficult for them to use any other option than the car.

DISCUSSIONS WITH ELECTED MEMBERS AND BILATERAL MEETINGS

4.1 The Commission invited elected members (Members of the Senedd, Members of Parliament, Police and Crime Commissioners, and Local Authority Leaders) to meet to discuss issues. The meetings enabled elected members to discuss the travel issues that their constituents faced and also provided an opportunity to be briefed on the work of the Commission. The discussions fed into the *Emerging Conclusions* work.

4.2 A number of bilateral meetings were held with organisations to gain an understanding of their concerns. These meetings enabled the Commission to reach out to a variety of organisations that operate across the South East Wales region, from business groups to wildlife charities.

MULTILATERAL STRATEGIC STAKEHOLDER WORKSHOPS

5.1 During November and December 2019, three workshops were held in Newport, Cardiff and Chepstow with strategic-level representative stakeholders. Approximately 80 people attended from across the transport, environment, housing, planning, local government, business, emergency services and health sectors.

5.2 The workshops identified problems with travel on the M4 and across the South East Wales region. They also developed thinking around a holistic, high level vision for the future of the region (centred around mobility, lifestyle and place) and generated solutions to deliver this future vision.

M4 and surrounding roads network

5.3 As a strategic infrastructure asset, the M4 is not considered to function as optimally as it should by stakeholders. It is considered an inferior quality motorway with an intermittent hard shoulder and poor road surface. The road is characterised by frequent closures and long diversions, congestion and delays, slow journey times and slow response times to incidents.

5.4 Variable speed limits are considered to increase poor driving behaviours, through erratic adjustments of driving speeds. This was also perceived to negatively affect air quality.

5.5 A variety of tactical changes were put forward for consideration such as removing localised 40mph speed limits, redirecting M4 traffic from the east via the A4810 Steelworks Access Road and closing M4 junctions.

5.6 Infrastructure improvements included a new M48 link to the M4 going east, widening of the Brynglas Tunnels, and a new link on the Southern Distributor Road at Maesglas to the A48/A48(M) at Coedkernew. Wider geographic improvements include the B4246 corridor from Blaenavon to the A465 and improved road infrastructure from north of Torfaen to the A465. A Severn Barrage incorporating a new road was proposed as well as new transport hubs at all motorway junctions.

Public transport

5.7 Many stakeholders held a negative perception of public transport. The customer service element of using public transport was generally held in low regard. Complaints included poor cleanliness, lack of facilities, and a lack of information and joined-up ticketing. Critical features such as affordability, reliability and frequency, journey time, connectivity and interchange, parking, and active travel routes from the bus stop or rail station were also of concern.

5.8 Assertions were made by stakeholders that it is often cheaper and quicker to travel by car than by public transport. Public transport is considered to be unsuitable for those with mobility issues as well as for those making multi-purpose trips, such as incorporating the school run, childcare, shopping or leisure activities into their journeys to or from home. Working patterns (e.g. shifts, variable hours) and the nature of working roles (e.g. that require car use during the working day) were also given as reasons why public transport is an unsuitable travel alternative to the car.

5.9 Rural perspectives of public transport stressed the importance of reliability. The infrequency of services in rural areas means that a cancelled or missing bus service can have a big impact when it leaves rural dwellers stranded away from home or feeling isolated. Both rural and urban users alike stressed the effect that lengthy travel times by public transport had on quality of life.

5.10 Stakeholders called for a modern, low carbon transport network across the region that is integrated, reliable, accessible, affordable and safe. More capacity and higher frequency were key requests.

5.11 Some stakeholders also felt that public ownership and control of the public transport system would lead to improvements, particularly in integration and ticketing.

Active travel

5.12 With walking and cycling rates in Wales still relatively low and static, stakeholders identified what they perceived as the main barriers to increased uptake of active modes. A lack of confidence brought by fear of cycling on busy roads dominated by traffic as well as a lack of well-lit foot paths and late park closing times were cited.

5.13 A lack of bike storage at stations and on trains, a lack of obvious pedestrian routes between bus and rail stations and insufficient cycling facilities at workplaces were also identified.

5.14 To boost mode share for active travel stakeholders called for cycle training for adults and children, safe routes to school and active travel champions at schools. To improve safety, road surfaces improvements, segregated cycle lanes and well-lit foot paths were identified. Employers were also identified as having a key role through providing safe cycle storage and showering/changing facilities and loans to purchase bikes and equipment.

5.15 An all-Wales bike purchase scheme as well a roll out of cycle hire schemes, particularly at transport hubs were also suggested. Better provision for on-board cycle carriage on public transport was seen as a key enabler.

Freight

5.16 Stakeholders felt a combination of wider consumer and lifestyle patterns with insufficient policy and infrastructure around low carbon freight was causing difficulties for moving freight across the region.

5.17 The popularity of online retailers with expectations of next day delivery are fuelling problematic logistical movements. Peak time travel for deliveries were necessary as the retail sector still operates in peak hours which is contributing to congestion. A lack of journey reliability on the M4 and surrounding roads was identified, with little network resilience to guarantee efficient freight movements.

5.18 Shifting freight from roads to rail and sea was extremely difficult given the lack of rail routes connecting to ports (with even road access affected by congestion), depots not located close to railways, and no incentive regime for encouraging disused freight lines. Stakeholders pointed to a lack of capacity, planning and financing across the whole rail freight system.

5.19 Incentivising cleaner goods vehicles was called for although many accepted that this is very difficult for larger vehicles. The 'final mile' for deliveries was suggested as a primary target so that large and polluting vehicle access to town and city centres was replaced with electric vehicles and cargo bikes.

5.20 To shift freight to rail, stakeholders called for better timetable integration across ports, ferries, rail and road. They suggested incentives for new market opportunities by allowing small freight on passenger rail services as well as bulk goods such as NHS medical supplies (including transplants and blood). Stakeholders also called for more investment in canal, river and coastal boat traffic to deliver goods and to consider drones for delivery of small parcels in rural areas. Building more consolidation centres was also seen as a solution to help reduce journey times.

Place-making and development

5.21 There was widespread recognition amongst stakeholders that land-use planning policies had created many of the problems in our transport system and had shaped the way we move, live and work towards needing a car.

5.22 A lack of a joined-up approach to planning has seen key developments like housing, hospitals, employment, retail and leisure sites located away from the public transport network, ensuring that access by car is the most convenient means. Economic development approaches were viewed as locating jobs long distances from where people live, with patterns of demand becoming more diffuse. This has increased both the need to travel and the duration of journeys.

It has also made it harder to provide an efficient or relevant public transport option.

5.23 Stakeholders perceived that the resulting dominance of car travel has had a significantly negative impact on quality of life and sense of place. Communities have been separated by busy, noisy roads with pollution hot spots contributing to health issues including respiratory disease, cancer, and low birth weight. Car parking and road space dominate the public realm, despite cars remaining stationary and unused for most of the day.

5.24 Stakeholders called for a reduction in the demand for travel through joined-up policy making at local and national level to facilitate sustainable land use, transport-orientated development and a polycentric approach to employment growth.

5.25 'Twenty minute' neighbourhoods were seen as a way forward, ensuring more schooling, work, retail and leisure were available closer to home and within the local community. 'Mini-Holland' pilots were needed to reconfigure neighbourhoods away from being car dominated and towards active travel. Green infrastructure and an attractive public realm were seen as important underpinning policies to these kinds of communities.

5.26 The public sector was seen as the ideal flag bearer for relocating jobs to local employment hubs (based around transport hubs), flexi-working and rolling out 5G. Stakeholders also want to see better use of Section 108 levers by local authorities to provide sustainable transport infrastructure, more car-free local housing development and more school and workplace travel plans.

‘HAVE YOUR SAY’ ONLINE PUBLIC ENGAGEMENT PLATFORM

6.1 The Commission launched an online public engagement platform in February 2020 as part of its ‘Have your Say’ campaign aimed at transport users and the wider public. This was publicised via social media and strategic stakeholder groups.

6.2 The online tool allowed people to pinpoint on a map of South East Wales, the areas where they experience any problematic travel issues and express their views on the required improvements.

6.3 Over 1,800 participants left one or more comments on the platform. Figures 1 is an example screenshot from ‘Have your Say’, which shows the locations and quantities of comments received.

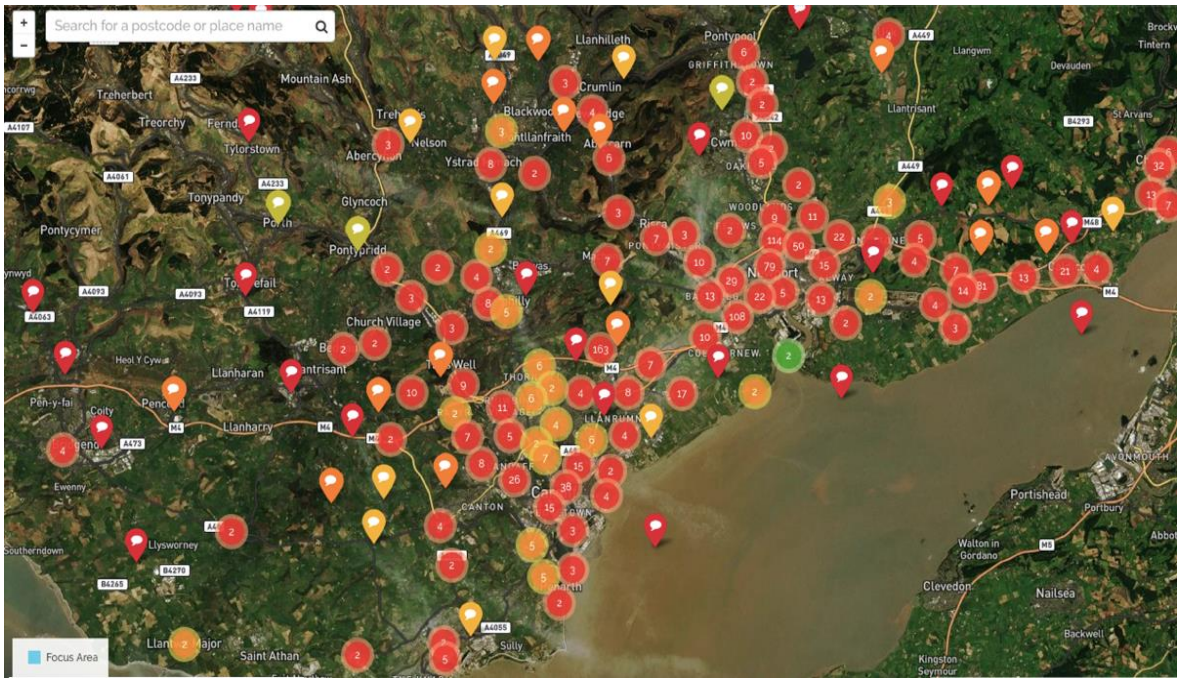

Figure 1: Screenshot of ‘Have your Say’ showing travel issues hot spots

6.4 Figure 2 shows the number of comments made by mode. The largest proportion of comments entered on to the platform relate to the car, followed, in order of magnitude by bus, rail, cycling, walking, Park & Ride, freight and motorcycling. However, if comments related to bus, rail and Park & Ride are combined to form a generic ‘public transport’ category, these total comments are higher than those relating to car, which suggests significant interest in public transport issues across the region.

6.5 The high concentration of car-related comments aligns with it being the dominant mode of travel in South East Wales. There will also be an inherent bias towards car issues given the strong negative public feeling around the M4

Relief Road decision and an awareness that the Commission's work is related to M4 congestion. Traffic congestion is the also the most commonly identified travel problem by participants of the platform.

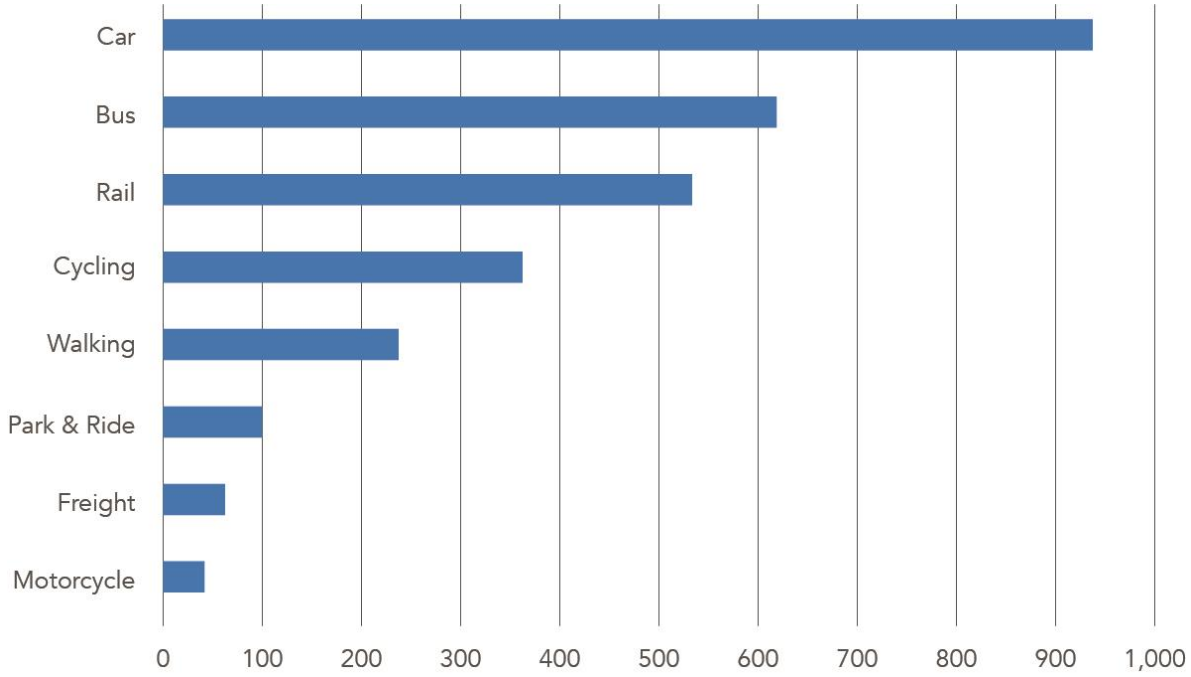

Figure 2: The number of 'Have your Say' comments by transport mode

Existing Travel Problems

6.6 Those who engaged with the platform were asked to place a 'pin' on a map to identify a specific location where they felt a travel issue existed. The platform then provided a selection of pre-determined issues to choose from. Participants were also provided with an 'other' option so that they could submit information that was not reflected by the pre-determined selection.

6.7 Figure 3 shows that the top three issues which negatively affected participants' travel at their chosen locations were traffic congestion, slow journey times, and a lack of public transport options.

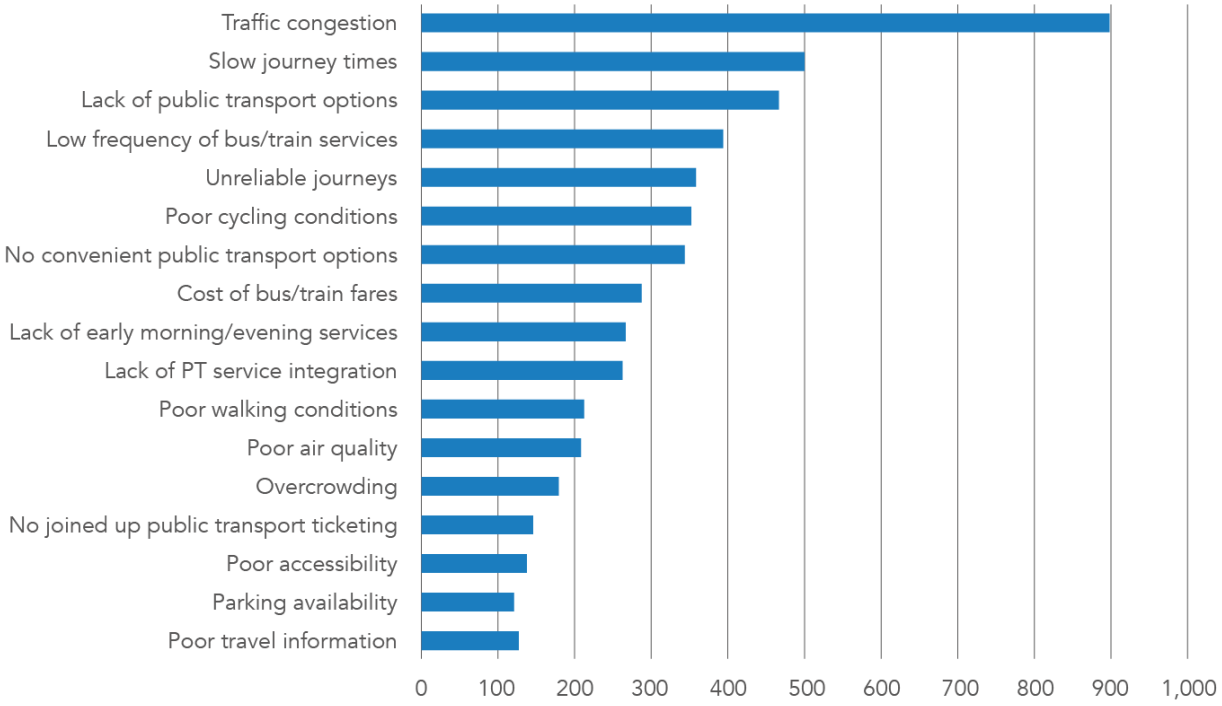

Figure 3: Number of times an issue was selected as negatively affecting transport by 'Have your Say' participants at their chosen location

Required Future Improvements

6.8 The same format was applied to questions around the specific type of improvements that participants felt would resolve their existing travel problems at their specified location. The platform provided participants with a selection of pre-determined improvements to choose from and also provided an 'other' option so that they could submit information that they didn't feel was reflected by the pre-determined selection.

6.9 Figure 4 shows the most frequently selected improvements that participants wanted to see. The top five most frequently selected were improvement of existing roads, more frequent public transport services, new train stations, faster journey times and joined up bus and rail services.

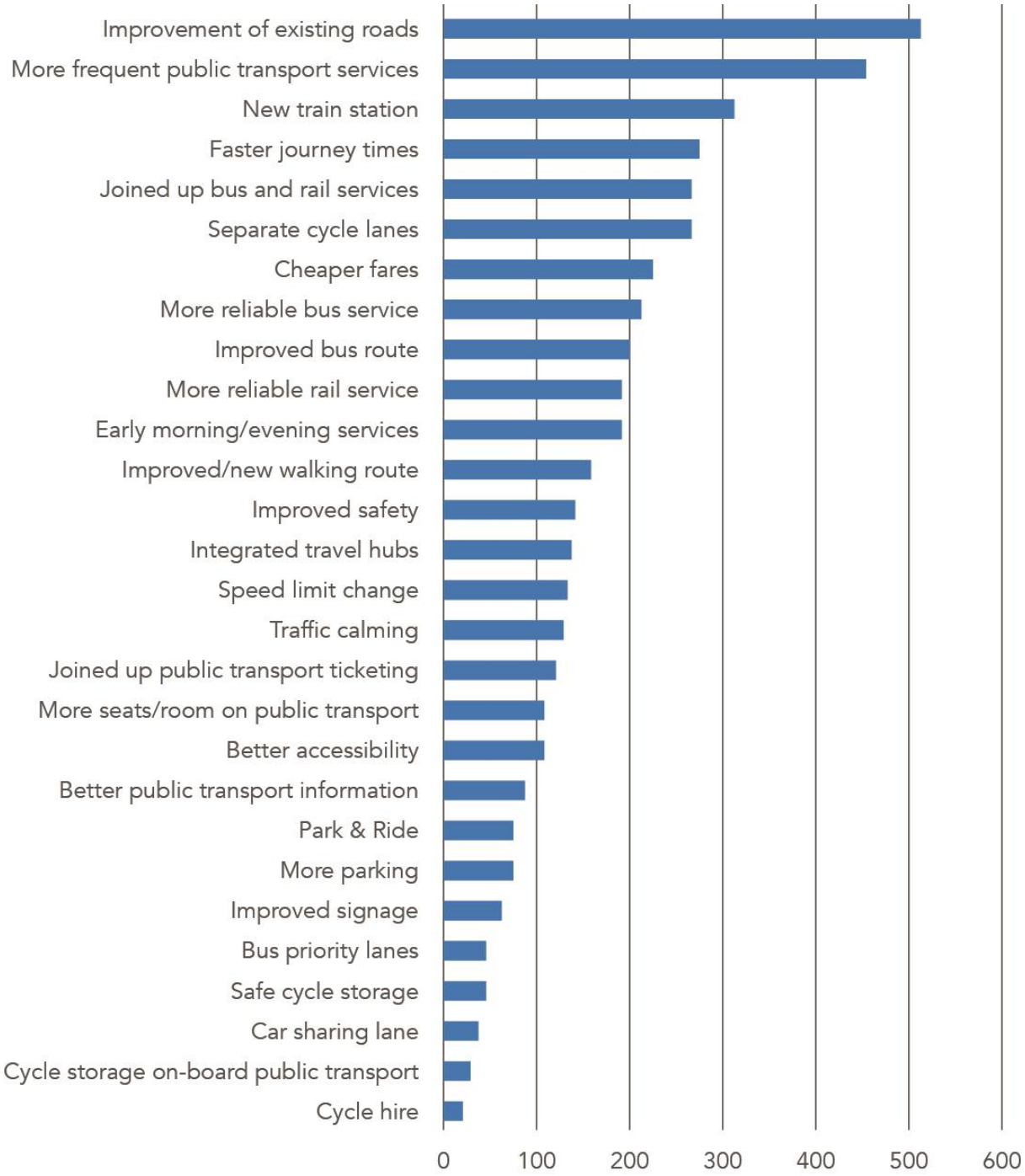

Figure 4: Number of times an improvement was selected by 'Have your Say' participants at their chosen location

Potential for Modal Shift

6.10 Despite participants identifying barriers to using sustainable modes of transport, a high proportion confirmed they would consider using their car less if improvements were made.

6.11 Nearly all 'Have your Say' participants answered the question: "If your top three improvements were made, would you consider using public transport, walking or cycling for some journeys that you currently make by car?"

6.12 Most participants showed a propensity towards switching modes for some of their journeys, with 65% answering ‘yes’ and 15% answering ‘maybe’. 20% stated they would not consider using other modes, despite improvements being made.

6.13 Overall, this suggests that there is a positive market for public transport modal shift that can be developed alongside a shift to active modes for some or all of the trip.

TRAVEL TO WORK SURVEY

7.1 Traffic analysis undertaken by the Commission has demonstrated that road congestion on the M4 is most problematic during peak hours and is very much a commuter problem. The Commission therefore wanted to focus survey work on large employers based along, or close to the M4 corridor, as these are the people most likely to use the M4 for commuting.

7.2 Travel to Work surveys are a useful tool for building an evidence base on travel patterns and behaviours around commuting. When done regularly, they also provide a useful measure of behavioural change particularly on modal share for journeys to work.

7.3 Traffic analysis has shown that the busiest traffic movements along the M4 (origin-destination movements) are peak time journeys between Cardiff and Newport, and between the wider South East Wales area and Greater Bristol.

7.4 The Commission targeted employee surveys and senior management interviews from a number of major public and private employers, whose locations aligned with these busiest traffic movements. The Travel to Work survey took place between February and April 2020 using a combination of face-to-face engagement on site together with an online version of the same survey.

7.5 The survey was then interrupted by the global outbreak of the COVID-19 virus, with the effect that the number of organisations and employees we had planned to engage with face to face has been reduced. It has also understandably resulted in many organisations (particularly those with key workers) prioritising their own essential COVID-19 related communications to employees rather than the promotion of our online Travel to Work survey. The consequence of these barriers was that the level of engagement with business was significantly lower than planned. As such, the results should be interpreted with a degree of caution.

7.6 Responses to the Travel to Work Survey were received from 39 different employers from across South East Wales and Greater Bristol. A full list of these companies appears in Annex A.

7.7 Due to COVID-19, only two tranches of face-to-face surveying was undertaken on-site with major regional employers; one public sector organisation in a city centre location and one private sector manufacturing company based in an out-of-town location. For these reasons, the sample size is insufficiently large to report the results here. The Commission will be considering alternative forms of engagement for the future, as described in *Emerging Conclusions*.

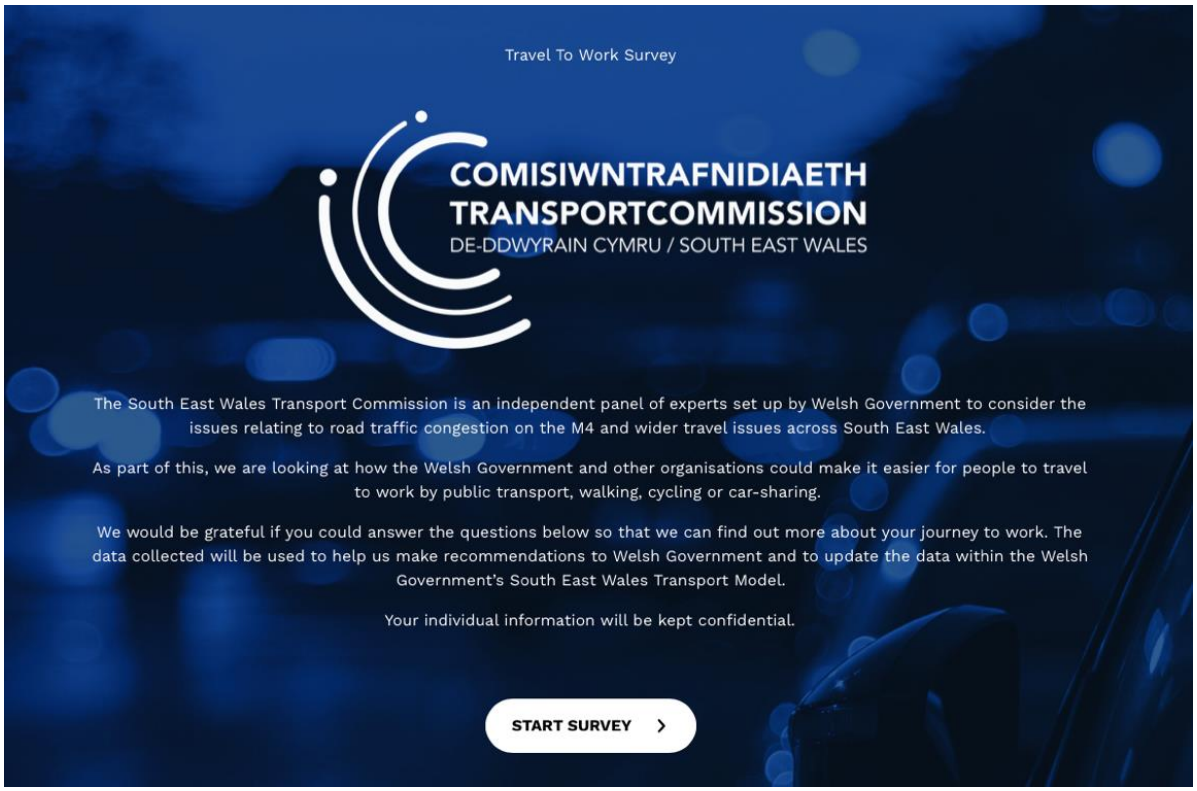

Figure 5: Screenshot of the Travel to Work Survey homepage

7.8 Our Travel to Work survey looked at:

- typical mode of commute
- travel distance, travel times and journey duration
- perceptions of ease/difficulty for commuting by public transport, active travel or car share and barriers to take up of these modes
- measures to encourage modal shift
- workplace parking and flexible working policies

Quantitative Findings on Current Travel Patterns to Work

7.9 The survey showed that 72% travelled to work by car, which is close to the average for Great Britain.[1] The majority of those commuting by car also travel in a single occupancy vehicle, with only 7% sharing a car for all or part of their commute.

7.10 The predominance of car for daily commutes is likely to be influenced by the fact that roughly three quarters of those respondents are provided with free car parking by their employer. In addition, two thirds of respondents said that they experienced barriers which made it difficult to use options other than the car. A

significant number of respondents were employees of organisations located at out-of-town sites along the M4 between South East Wales and the Greater Bristol area, that are not well served by public transport. These locations represent the typical profile of economic development along the M4 corridor.

7.11 Approximately 20% of respondents used the bus or the train to commute to work, which is higher than the Great Britain average.[1]

7.12 Almost 10% of respondents commuted by active travel of which around half cycled to work. The proportion of those cycling is higher than the Great Britain average and, conversely, the proportion of those walking is lower than the Great Britain average. This can be explained by the long distances that a significant proportion of respondents travel to work; 55% of respondents travelled over 10 miles for their daily commute, with 35% of respondents travelling for 20 or more miles each work day.

7.13 The average journey time to work also reflects the long distances many commuters are travelling. The average journey time of those surveyed is 46 minutes, which is significantly longer than the Great Britain average of 29 minutes.[1]

Findings on Future Travel Patterns to Work and Potential for Modal Shift

7.14 Just under half of car drivers in the survey agreed that they would be willing to try other options such as walking, cycling, public transport or car sharing to travel to work, some of the time.

7.15 Over half of participants agreed that they would be willing to use Park & Ride as part of their daily commute if they considered it to have a good service and good access to their employment site.

7.16 Two thirds of respondents indicated that they were interested in exploring the option of working flexible hours or working from home. For those not interested in this option, around half suggested that this was because the nature of their job precluded them from being away from their workplace. 80% of respondent's employers already have policies in place to enable flexible working hours or work from home part of the week.

[1] Department for Transport, Transport Statistics GB 2019

Incentives for Commuting by Public Transport

7.17 Figure 6 shows the interventions that participants felt would most encourage them to use public transport rather than their car for travelling to work. The top-rated interventions were cheaper bus and train fares, more frequent bus and train services and faster journey times by public transport.

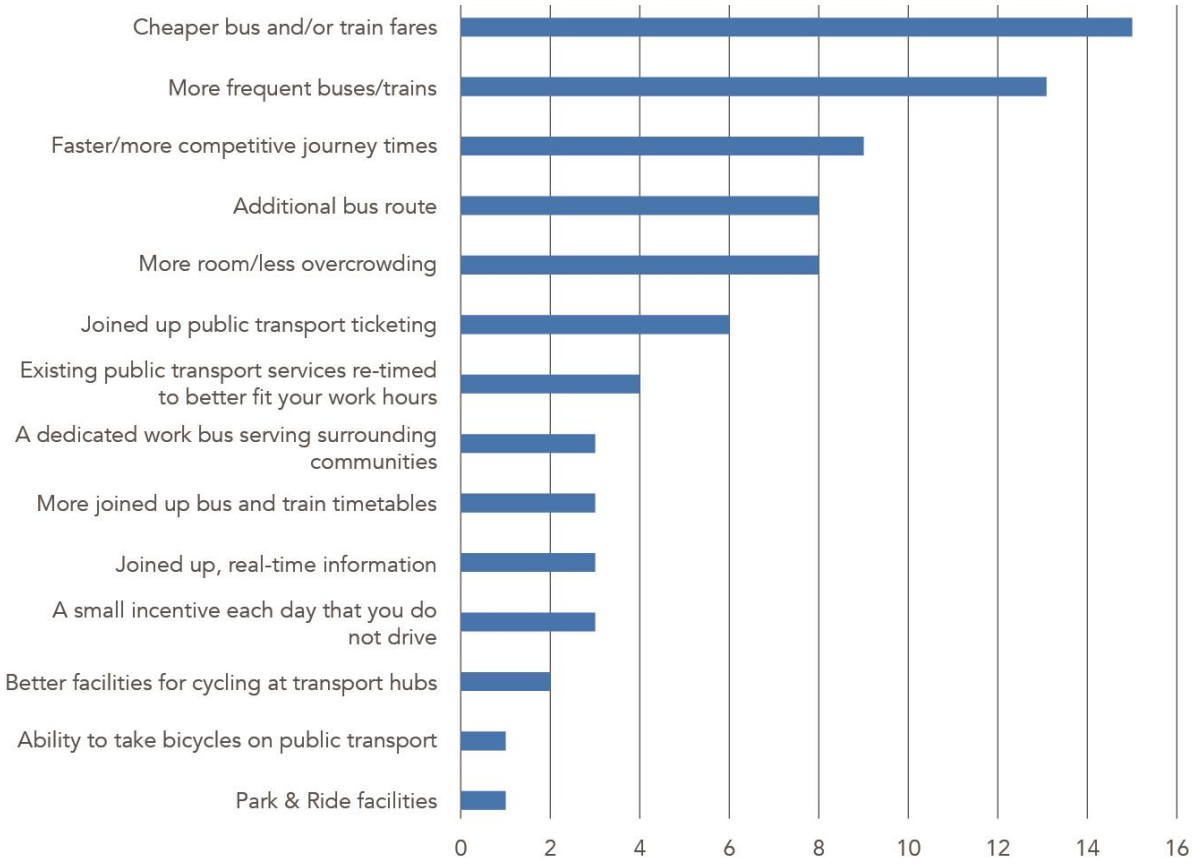

Figure 6: Percentage of respondents selecting public transport intervention

7.18 A number of barriers that prevented using public transport to work were cited by participants. A common barrier to using the bus was the predominance of routes travelling into cities, rather than across. In addition, poor connections between bus services make journey times longer. For train, participants identified the lack of a bus service taking them to and from the rail station to their workplace. Even large sites with over 10,000 employees did not offer a shuttle service from the nearest rail station. Other barriers common to both bus and rail were the lack of direct and frequent services, unreliability, long journey times and expensive fares.

7.19 Those with caring responsibilities often needed to make multi-purpose journeys, e.g. to child care providers that would not be feasible without travelling by car.

Incentives to Commuting by Active Travel

7.20 Figure 7 shows the popularity of active travel incentives. The top three interventions that participants felt would encourage them to walk or cycle to work rather than drive, were new dedicated cycle tracks, a small incentive each day without car use and showers and changing rooms at work.

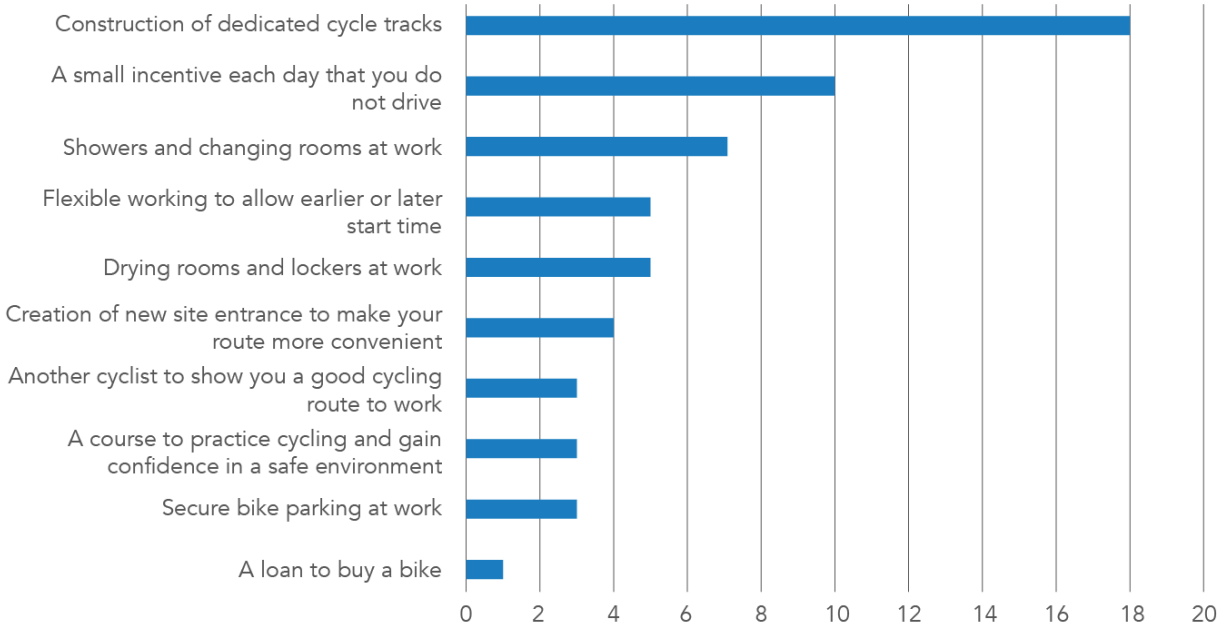

Figure 7: Percentage of respondents selecting active travel incentive

7.21 The most commonly cited barrier for commuting to work by active means was safety, with many respondents stating the roads were simply not safe enough for them to consider cycling. Age or fitness levels were also referenced as to why some respondents would not even consider active modes, particularly cycling.

Attitudes to Commuting by Car Sharing

7.22 Figure 8 shows the popularity of car sharing interventions. The top three interventions that respondents felt would most encourage them to car share rather than drive to work on their own were a car share app to help find a partner with similar work patterns, reserved car parking in a prime spot for car sharers and a small incentive each day without car use.

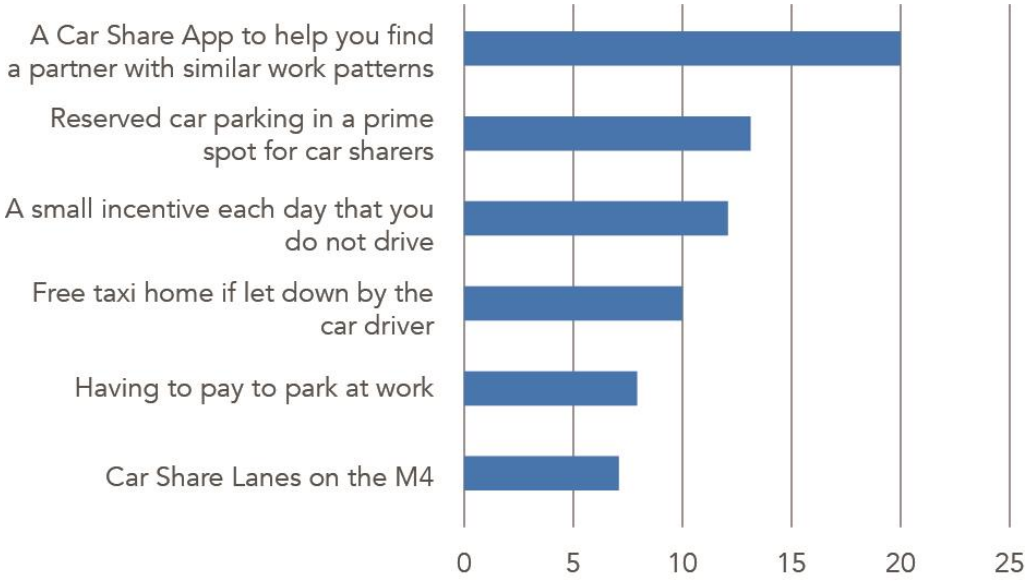

Figure 8: Percentage of respondents selecting car sharing incentives

7.23 A commonly cited barrier for car sharing to work, particularly for those in manufacturing jobs, was the variable clock-off times which made it difficult to plan a shared journey with a colleague. Many also stated that it was difficult to identify another colleague who had the same finishing time. For those working flexi-time (predominantly white-collar workers), car sharing's lack of appeal appeared to be based around child care and the need to drive via school on the way home. Others felt it curtailed their ability to go to the gym or supermarket on the way home from work. In essence, car sharing was associated with a lack of flexibility and the inability to make personalised journeys.

7.24 Safety or social reasons were also cited, particularly (though not exclusively) by women, with respondents expressing the need to know the person well to ride with them in a car rather than being paired up with an 'anonymous' colleague via a car sharing app.

Incentives for Park & Ride

7.25 The survey identified that 57% of respondents said they would be willing to use Park & Ride as part of their daily commute if they considered it to have a good service and good access to their employment site.

7.26 From the above, 36% stated they would not consider using a Park & Ride, expressing a variety of reasons including a perception that they are time consuming, inconvenient and involve an additional interchange in the journey. There was also a perception that they are insecure with an associated high risk of car theft and damage. Others expressed a similar rationale for not car sharing, which is the need to have their cars for business use during the day.

7.27 Once in the car, some respondents felt it pointless to change mode rather than drive all the way to work, a point underpinned by the high levels of free parking supplied to employees by many workplaces in the survey.

7.28 Figure 9 below is a snapshot of comments made by Travel to Work Survey respondents about barriers to sustainable commuting.

Figure 9: A selection of qualitative views of Travel to Work Survey respondents

ANNEX A: PARTICIPANT ORGANISATIONS IN TRAVEL TO WORK SURVEY

Responses to the Travel to Work survey were submitted from the following organisations in South East Wales and the South West of England:

1. A-Gas
2. Airbus
3. ALD Automotive
4. Alive Activities
5. Atkins
6. AXA
7. Bristol Airport
8. Bristol City Council
9. BT Group
10. Burges Salmon
11. Cardiff City Council
12. Cardiff University
13. DAC Beechcroft
14. DSV Air & Sea
15. Easyjet
16. Forestry England
17. Galliford Try
18. GKN
19. Gleeds Partnership
20. Halo Foods
21. Hewlett Packard
22. Highways England
23. HMRC
24. Intellectual Property Office
25. Junction 28 Group
26. Kendall Kingscott
27. Kerry Europe & Russia
28. MBDA
29. MOD
30. Newport City Council
31. Newport Wafer Fab
32. North Bristol NHS Trust
33. Rolls Royce
34. Simmons & Simmons
35. South Gloucestershire Council
36. University of Bristol
37. University of the West of England
38. Welsh Government
39. WSP

We are also grateful to the contribution made by the North Bristol Sus Coms in conducting this survey.