



**The Next Step for
Transport in Wales:
Achieving a sustainable
transport system for
people and planet**



**By Joe Rossiter
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ARUP



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About the author

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About the IWA

We are a think tank and charity, independent of government and political parties.

By bringing together experts from all backgrounds, we conceive ambitious and informed ideas which secure political commitments to improve our democracy and economy.

We provide platforms for debate, opportunities for people to make their voices heard and agenda-setting research. We are funded by our members, our events and training sessions, and supported by trusts, foundations and other funding bodies.

About Arup

For over 75 years, Arup has been recognised for its vision, talent and tenacity, having been at the forefront of the most ambitious and challenging designs and engineering.

Dedicated to sustainable development, the firm, owned in trust by its members, is a collective of 18,000 engineers, designers, advisors and experts working across 140 countries. Founded to be both humane and excellent, the organisation collaborates with their clients and partners using imagination, technology and rigour to shape a better world.

The Next Step for Transport in Wales: Achieving a sustainable transport system for people and planet

This paper is based on the second in a series of two roundtable discussions convened in January 2024 by the Institute of Welsh Affairs (IWA) in partnership with Arup.

The aim of these discussions was to convene key stakeholders in Wales' net zero journey, to put forward evidence-informed recommendations on delivering a timely, cross-sector and socially equitable transition across the economy. In doing so, our intention is to inform the ongoing development of net zero policy and delivery in Wales.

Background

The second roundtable, which informs this paper, brought together key stakeholders in the transport space in Wales (attendees are listed below). The positions set out in this paper are not directly representative of every contributor's views, rather they are an attempt to reflect and conceptualise the key topics of a broader conversation. As such, perspectives and policy positions put forward here are directly attributable to the IWA and no one else. They are, however, directly informed by the interventions of attendees at the roundtable.

The overarching aim of the discussion was to bring together key stakeholders to discuss the challenge of creating a sustainable transport system in Wales. As noted by many present at the roundtable, Welsh Government has developed a number of strong policies in this area over recent years, carving a distinct pathway to UK Government. Yet, despite the strong policy context, the pace of the transformation required across Wales' transport system remains slow. The UK Climate Change Committee report on reducing emissions in Wales states that 'progress on transport is off-track for areas in which the Welsh Government has policy control' (p.18)¹. From accelerating the take-up of electric vehicles (EVs), to providing adequate public transport options, to widespread behavioural change - there are numerous challenges and opportunities ahead of us in this critical decade for reaching net zero.

The roundtable was chaired by the IWA's then Director, Auriol Miller, and consisted of three hours of substantive discussion on the challenges of delivering a fit-for-purpose transport system for the whole of Wales and unleashing the opportunities ahead. Based on this discussion, this paper makes a number of practical policy recommendations to help address the delivery gap in transport policy and action in Wales. It is clear, however, that policy on its own is not enough. Adequately equipping all actors to fulfil their role in the transition is vital to enabling effective delivery of the large-scale infrastructure projects ahead of us.

During the day, Arup set out two provocations for attendees. These centred on challenging our underlying assumptions of a sustainable transport system and on putting inclusion at the heart of our transport system. These two distinct discussions will form the jumping off points of this paper.

¹ [UK Climate Change Committee. 2023. Progress Report: Reducing Emissions in Wales](#)

We stand at a moment of political change: we have a new Welsh Labour and First Minister in Vaughan Gething leader as of March 2024, a UK General Election is required to take place by the end of January 2025 at the latest, and in 2024 we enter the second half of this Senedd. Our intention is that this paper represents a valuable intervention at an important moment of political opportunity, as a broad range of actors are planning out how they can meaningfully contribute to Wales' net zero mission over the vitally important decade ahead.

Key recommendations

The following recommendations result from the conversation at the roundtable and an analysis of policy levers and actions available by the IWA as a result. The full recommendations and key findings can be found at the end of this report.

- 1. Encourage a behavioural change approach with community informed decision and policy-making, which creates a value-driven transport system fit for all in Wales**
 - a. Welsh Government should consider policy benefits to encourage a behavioural change and get communities on board with its decisions
 - b. Invest in behavioural change
 - c. Explore democratic mechanisms to provide pathways for change
 - d. Buses - deliver a network with public benefit at its heart
 - e. Continue the positive policy direction on transport - supporting a broader consideration of value when appraising transport projects at all levels

- 2. Underpin policy making and implementation with practical targets, solutions and partnerships across all levels of government, the private, public and third sectors**
 - a. Set stronger targets to direct transport delivery outcomes
 - b. Undertake robust data collection that fits policy ambitions
 - c. Establish best practice for employers to support sustainable transport modes in their organisation
 - d. Accelerate the transition to transport oriented development at all levels of government
 - e. Invest in public sector training initiatives
 - f. Utilise the CJC process to maximise regional decision making on transport

Participants

1	Auriol Miller	[then] Director [Chair]	Institute of Welsh Affairs
2	Joe Rossiter	[then] Policy & External Affairs Manager	Institute of Welsh Affairs
3	Ben Pritchard	Director and Cardiff Office Leader	Arup
4	Allan Pitt	Associate, Cities Planning & Design	Arup
5	Ben Sibert	Group Leader and Director, Transport	Arup
6	Jessica Postance	Associate, Climate and Sustainability	Arup
7	Sue Flack	Sustainable Transport and Development Consultant	Sue Flack Consultancy
8	Geoff Ogden	Chief Transport Planning and Development Officer	Transport for Wales
9	Prof Stuart Cole	Professor Emeritus of Transport Economics and Policy	University of South Wales
10	Jason Prince	Director	Urban Transport Group
11	Dr Tom Porter	Lead	Healthy Travel Wales
12	Alwen Williams	Portfolio Director	Ambition North Wales
13	Kaarina Ruta	Transport Assistant	Welsh Local Government Association
14	Christine Boston	Director	Sustrans Cymru
15	Dafydd Munro	Head of Transport Decarbonisation Policy	Welsh Government
16	Stan Townsend	Secretary	Wales Net Zero 2035 Challenge Group & WCPP
17	Max Hampton	Design Advisor	Design Commission for Wales
18	Deb Harding	Head of Transport Strategy, Planning and Metro's	Welsh Government

The path forward

Provocation 1: Prioritising decarbonising private car usage

The first provocation on the day focussed on the trade-offs, focus and vision required to transform and decarbonise Wales' transport system.

The provocation stated that there is a global climate emergency which is increasingly impacting our lives in Wales, whether through floods² or rising temperatures³. As such, the main aim of policy activity on transport and beyond, should be on tackling this existential issue. The aim of transport policy should be to prioritise decarbonisation at pace.

Llywbr Newydd⁴ - Wales Transport Strategy, identifies a modal shift, that is, shifting journeys out of private cars and onto more sustainable modes of transport as a policy priority. This is underpinned by the sustainable transport hierarchy, which establishes active travel as the optimum transport mode, followed by public transport. The provocation stated that this was insufficient for tackling the scale of transformation of the transport system, and would not be able to be delivered at the pace required by stringent emissions targets. The success of a widespread modal shift is also underpinned by sustained behaviour change from the population, which appears to not be taking place. Whilst tracking of this modal shift in Wales has somewhat stalled with the lack of a National Transport Survey over the last decade, other models suggest that households in Wales remain car-dependent⁵. Whilst these models are based on transport mode for commuters, they still paint a picture of a persistently car-dependent Wales, with this trend supported by available data on transport mode taken to school⁶.

Wales' second Carbon Budget⁷ states the aim of reducing emissions from passenger transport by '22% in 2025 (from 2019) and 98% in 2050 through demand reduction, modal shift and the uptake of low carbon technologies' (p.13). The modal shift target is to 'reduce the number of car miles travelled per person by 10% by 2030 and to increase the proportion of trips by sustainable transport mode ... to 35% by 2035 and 39% by 2030'. To achieve this scale of change requires a two-strand approach: encouraging mass behaviour change from the public and a rapid investment in making sustainable transport modes more accessible, affordable and convenient.

Beyond this, it is important to provide context to the focus on 'trips' as a the key metric through which to measure policy progress on modal shift. Trips, of course, can vary greatly in length. Indeed the 2022 English Travel Survey highlighted that whilst 31 percent of trips were by walking, they covered just 4 percent of total distance travelled⁸. Conversely, car transport represented 58 percent of trips, but 78 percent of distance⁹. In this way, trips could be conceived as a blunt instrument for analysing progress and thus directing policy attention

² [Friends of the Earth, 2023. Is Flooding in Wales getting worse?](#)

³ [Welsh Government, 2021, Guest Blog: How will climate change impact Wales in the future?](#)

⁴ [Welsh Government, 2021, Llywbr Newydd - Wales Transport Strategy](#)

⁵ [Welsh Government, 2021, Wellbeing of Wales national indicators: Percentage of journeys by walking, cycling and public transport](#)

⁶ [Welsh Government, 2022, Active travel \(walking and cycling\): April 2021 to March 2022](#)

⁷ [Welsh Government, 2021, Net Zero Wales: Carbon Budget 2 \(2021-2025\)](#)

⁸ [Department for Transport, 2022, National Travel Survey: England 2022 Main Results](#)

⁹ Ibid

to addressing, especially given the overall goal of decarbonising the transport system. Trips as well as passenger Kilometres working in tandem would therefore be a better measurement of both aims and success.

From this lens, the provocation stated that many of the car trips taken in Wales are longer inter-urban journeys that are currently, and not for the foreseeable future, not met by adequate public transport service provision. Indeed modal shift and public transport has a stronger positive case for urban journeys, which can be seen in the rollout of active travel schemes and public transport infrastructure development in Wales to date. As such, there should be more focus on decarbonising car usage at pace than trying to get people out of cars. According to the provocation, modal shifts have a key role to play, mainly in urban areas, but will not be the right alternative for many journeys.

The wider specific context to the question of decarbonisation of Wales' transport sector is that, despite much attention and policy, Wales' transport emissions have remained relatively constant since their 1990 baseline. As the then Deputy Minister for Climate Change Lee Waters MS acknowledges¹⁰:

'To reach net zero every sector must cut its carbon footprint urgently. To-date transport has contributed the least to cutting emissions - a fall of just 6% since 1990, compared to cuts of 65% in emissions from sectors like waste. Transport is a laggard.'

Transport emissions have thus been stubbornly persistent and are an area in need of addressment according to the UK Climate Change Committee¹¹, the body legally mandated to examine the UK's plans and activities to reach net zero.

From this perspective, it is clear that more focus should be given to means to effectively decarbonise our transport system. This leads us to consider accelerating decarbonisation as the key focus for transport policy in Wales.

Taking such an approach would enable us to tackle the biggest issue when it comes to transport emissions in Wales, that is the emissions from private car usage. Cars alone account for seven per cent of Wales' total carbon emissions and 55% of the transport sector¹².

This would mean decoupling this private car usage from the carbon emissions it currently generates. Accelerating the transition from petrol and diesel cars to electric vehicles would therefore be the most useful focus for policymakers and practitioners alike.

Therefore, the focus should be on incentivising electric car take-up and investing in charging infrastructure across Wales, which is key - and as the UK Climate Change Committee stated in their recent Wales report¹³: the 'development of charging infrastructure needed to support the transition to electric vehicles is not happening quickly enough' (p.11). There is a clear need for rapidly accelerating this in Wales, to make EVs viable alternatives to petrol and

¹⁰ [Lee Waters, 2024, Transport for Wales 2.0](#)

¹¹ [UK Climate Change Committee, N.D. About the Climate Change Committee](#)

¹² [Wales Government, 2019, Transport: Sector Emissions Pathway](#)

¹³ [UK Climate Change Committee, 2023, Progress Report: Reducing Emissions in Wales](#)

diesel vehicles in communities across Wales. This is especially the case for more car-dependent communities where the car will remain the primary mode of transport for the foreseeable future.

The above approach means bypassing one of the key barriers underpinning much of the challenge Wales faces in its transport journey - that of behavioural change. Encouraging people out of their cars, especially without adequate alternatives, has and will continue to be a significant challenge, taking a significant amount of commitment and funding to achieve. It is clear that changing people's behaviour is a challenging undertaking, as they aren't always aware of the environmental or health consequences of their actions and transport choices.

With behavioural change acknowledged to be key in order to tackle transport emissions, the growth in the adoption of EVs¹⁴ across the UK has been an example of a positive shift, whilst not reaching the scale that is needed yet. This expansion of EV ownership is a useful example of positive green growth - an image of a more sustainable transport system which has a positive impact on industry and the environment. Yet, EV adoption in Wales falls far below the UK average¹⁵, presenting unique challenges for policymakers and industry. This is especially stark giving the continuing comparatively high price point of EVs and hybrids. The UK Climate Change Committee acknowledge that there are 'promising early signs in the uptake of electric vehicles and policies to incentivise a shift away from private car use'¹⁶ - yet, progress must accelerate over the critical decade ahead. Arup have worked alongside Welsh Government on the development of their EV policy, positively shifting the focus in this area towards instilling confidence in all electric cars and vans users in Wales that they can access electric vehicle charging infrastructure when and where they need it, whilst establishing accessibility as a key principle¹⁷.

The first provocation also highlighted that public policy should prioritise incentivising the shift to electric vehicles, and ensuring the transition is made even more attractive by investing substantially in charging infrastructure across the nation.

Rather than focusing on getting people out of cars and onto more sustainable transport modes, whether active travel or public transport, this approach would mean continuing to have communities which prioritise private car usage.

The provocation set the tone for a conversation on whether this was the desired pathway to net zero emissions from Wales' transport system. With pushback from a number of roundtable participants, the provocation acted as just that, a push to consider the wider purpose and values underpinning what our transport system is for and for whom.

Discussion: Beyond decarbonisation

Although a significant pushback to the approaches laid out in the provocation were voiced around the table, it created a space for a meaningful discussion about what the purpose of

¹⁴ [RAC, 2023. The road to electric - in charts and data](#)

¹⁵ [Senedd Climate Change, Environment and Rural Affairs Committee, 2023. The Welsh Government's EV charging infrastructure strategy and action plan](#)

¹⁶ [UK Climate Change Committee, 2023, Progress Report: Reducing Emissions in Wales](#)

¹⁷ [Arup, N.d., Shaping Wales' electric vehicle charging infrastructure](#)

our transport system should be, what focus it should have and what values underpin the case for change.

It was agreed that decarbonisation is a big part of it, but it was evidently equally important of *how* we decarbonise rather than a question of decarbonising at all costs.

It is clear that the major whole-systems transition within the transport system in Wales expected over the next decade is a moment of opportunity as much as challenge. A moment to reimagine, re-evaluate and re-prioritise what our transport system is for, who it serves and how.

In doing so, a vision for Wales' transport system which seeks to replicate our current system, but with EVs, fails to acknowledge the many ways in which the status quo isn't working: a system which is failing to deliver socio-economic benefits to communities (an issue explored in a PhD thesis by Marc Lewis¹⁸), which isn't equally accessible to all (an argument explored later on in this report) and isn't adequately providing people with affordable and sustainable choices to make their everyday journeys. The replication of our current transport system, but with EVs would fail to deliver on the opportunity for transformative change.

It is also important to acknowledge at this point that discussions on EVs do not correlate to how people in Wales experience the transport system. EVs have a high initial uptake cost which will be prohibitively expensive for many. Whilst acknowledging that EVs have typically lower lifetime cost than petrol or diesel cars¹⁹, and that their comparative price *should* fall over the long term, the upfront costs freeze many in Wales out of the EV picture. A focus on EVs is, therefore, at time of writing, a highly exclusive and unrepresentative approach, albeit not without purpose.

With a lack of fiscal levers at Welsh Government level to publicly subsidise EV take-up²⁰, this solution will have to be driven by the private sector. Questions around where Wales could find the money for EV subsidies and road user charging, a policy posited in the National Transport Delivery Plan²¹, have failed to materialise, and with Local Authorities unlikely to be at the forefront of implementation, this, at present, appears a policy dead end. The discussion on new forms of road taxation is a wider area of UK policy consideration, with the Resolution Foundation strongly calling for urgent reform of road taxes²². How such taxes can be implemented in an equitable manner and how their collection and redistribution can form the basis of the EV transition is open to question.

Participants also challenged the pipeline of transitioning to EVs. Some questioned the robustness of trends of EV purchasing, whilst others expressed concerns around whether the grid capacity was fit for meeting the accelerated uptake of EVs required to meet a net zero pathway.

¹⁸ [Lewis, M. 2023. Making Connections: The Socio-Economic Impacts of an All-Wales Integrated Transport System](#)

¹⁹ [Jolly, J. 2023 in the Guardian. Are electric cars too expensive to tempt motorists away from petrol and diesel vehicles?](#)

²⁰ [IWA. 2022. Fiscal Firepower: Effective policy-making in Wales](#)

²¹ [Welsh Government, 2022. National Transport Delivery Plan 2022-2027](#)

²² [Corlett, A and Marshall, J.. 2023. Where the rubber hits the road: Reforming vehicle taxes](#)

The challenge of charging infrastructure was also highlighted, with current provision and plans behind schedule. Although this is an issue even within urban areas, where those without access to a private parking space struggle to charge their vehicles reliably, the current lack of provision is specifically noticeable in rural Wales: car dependency is particularly prevalent in rural communities and with a third of Wales' population living rurally²³, EV charging is least available to those who will most need it, particularly for longer journeys²⁴.

That is not to say that the exclusive answer for rural communities is private cars, as Welsh Government's *Our roadmap to bus reform* highlights, 'most of the 'rural' population live on transport corridors near settlements with shops and facilities. For these people, we can sustainably provide good ways to get to local towns and villages without relying on a car²⁵' (p.11). A mixed approach should be taken, which is distinct and specific to each place within a region.

A number of roundtable participants also highlighted their concerns around the wider global environmental and ethical impact of EVs²⁶. Concerns spotlighted the unethical mining practice for core elements of lithium batteries and the lack of focus on their end of life. The question is: do we want these to be the supply chains for the future, delivering the products whose very aim is to ensure a decarbonised transport system? What is certain is that this is not a zero-sum game: we can call for the widespread and necessary decarbonisation of our energy grid and transport system whilst also calling for better practices further up the supply chain for critical materials.

A transport system based on car usage, albeit with predominantly electric or hybrid vehicles, will always be hindered by road-traffic associated issues such as congestion, infrastructure development and maintenance, and poor air quality. Wales has introduced The Environment (Air Quality and Soundscapes) (Wales) Act 2024²⁷, which provides a framework for setting more stringent air quality targets, which are greater aligned to the World Health Organisation's guidance. The introduction of such legislation highlights the cross-party commitment in Wales to tackling air quality, which is some of the worst in the UK²⁸. With this in mind, increasing EVs may not be the answer. Whilst they perform better compared to petrol or diesel cars²⁹, they still contribute to poor air quality³⁰ through non-exhaust emissions which are further aggravated by EVs typically heavier weight. Decarbonisation of cars alone, therefore, may not tackle this interlinked challenge of air quality.

²³ [As of the 2011 Census. The same analysis has not been run for the 2021 Census. Office for National Statistics, 2011 Census Analysis - Comparing Rural and Urban Areas of England and Wales, November 2013, p9](#)

²⁴ [Welsh Government, 2021, Electric Vehicle Charging Strategy for Wales: Facilitating the Transition to Net Zero](#)

²⁵ [Welsh Government and Transport for Wales, 2024, Our Roadmap for Bus Reform: Towards One Network, One Timetable, One Ticket](#)

²⁶ [New York Times, 2021, How Green are Electric Vehicles?](#)

²⁷ [Senedd, 2024, The Environment \(Air Quality and Soundscapes\) \(Wales\) Act 2024](#)

²⁸ [Senedd Research, 2021, Clean air for Wales](#)

²⁹ [RAC, 2022, Do electric vehicles produce more tyre and brake pollution than their petrol and diesel equivalents](#)

³⁰ [Jolley, J. 2024, Do electric cars have an air pollution problem? In the Guardian](#)

Continuing to focus on a car-dominated transport system, whether EV or not, when 19.4% of households in Wales do not currently have access to a car or van³¹ is an exclusive approach not routed in the experience of many.

In order to reach Welsh Government's ambitious modal shift targets, widespread societal change is required to rewire the system away from car dependency. Ultimately, this change involves difficult decisions from policymakers and transport users. Policy conversations often talk of taking a 'carrot and stick' approach to enable cultural change. Policy carrots offer people something in order to persuade them to make a change, whilst sticks are intended to punish those not making the desired change. In Wales, where fiscal headroom to offer carrots is constricted, sticks are relied upon to a greater extent. This presents challenges for gaining public support for transformational change. How the transition to a more sustainable transport system is incentivised and seen as a positive journey rather than a sacrifice is vital.

In conclusion, the first substantive discussion focused on the fundamental principles underlying Wales' transport system, what it's for and how we prioritise policy and funding. The conversation around tackling emissions and foregrounding EVs was useful in setting the tone for the next section, which was on creating a transport system which delivers more socially equitable outcomes for people in Wales. The fact that the majority of participants in the room generally agreed on the founding principles for transport policy (as established in Llwybr Newydd³²) was a positive note which demonstrates the alignment between the private, public and third sectors.

Provocation 2: A transport system which works for all

The second discussion at the roundtable examined the issue of transport poverty in Wales, and how this can best be alleviated through targeted policy actions.

The provocation highlighted the need for the net zero transition in the transport sector to be a means to deliver more equitable outcomes. It was acknowledged that, beyond the need for decarbonisation, the transport system as it currently stands doesn't function adequately for far too many people in Wales. Sustrans Cymru's *Making the Connection* report³³ starkly portrayed the widespread inequalities inherent in our transport system, with high levels of transport poverty experienced across the nation. The status quo freezes all too many people out of the transport system and therefore acts to further entrench Wales' already unequal economy. Whilst, as the first session highlighted, the transition to EVs is important, this would only worsen the transport poverty, with EVs currently being more expensive than their petrol and diesel counterparts.

The economic and social impacts of transport poverty are many: low-income households travel less, have fewer work and study opportunities available to them and are, therefore, more likely to be stuck in unfavourable economic circumstances. In a nation with high economic inactivity rates (typically above 20 per cent, and above the other UK nations and

³¹ [Office for National Statistics, Census 2021, Car or van availability by country \(Wales\) \[Accessed March 2024\]](#)

³² [Ibid](#)

³³ [Sustrans Cymru, 2022, Making the Connection: Why Wales must act now to tackle transport poverty and ensure access for everyone](#)

regions³⁴), our transport system could exacerbate economic inequalities and the wider economic underperformance of the nation. Research suggests that transport is a vital facilitator of social inclusion and wellbeing and an important tool to improve inequality³⁵. Transport is thus an *inhibitor* and an *enabler* of wider inequalities. Improving access to affordable sustainable transport options addresses climate and social justice, which are interlinked systemic challenges.

Making it harder and more expensive for people to use their cars may seem an attractive policy solution, indeed, aiding necessary emission reductions targets. Yet, if there are no realistic alternatives, this approach will lead to inequitable outcomes, where people on lower incomes are further frozen out of the transport system and as a consequence, from other related opportunities.

In efforts to decarbonise, it is equally important to ensure that people's access to reliable, affordable and accessible transport options is *enhanced*, not *reduced*. In doing so, the net zero transition must aim to reduce the transport poverty gap with real, feasible alternatives to using cars baked into any decision-making. Tackling the two challenges of transport inequality and net zero, then, are shared missions.

When talking about a modal shift, discouraging car use cannot be seen as the only solution. Without sufficient alternatives to car usage, especially in the most car dependent communities in Wales, efforts to change behaviours and habits will fall flat. Unsurprisingly, cars are so widely used - the perception of safety, reliability, accessibility and, at times, affordability, are unquestionable. Therefore, ensuring alternatives to the car which are equally, and even more, accessible, reliable and attractive, should be a key consideration for all policy and decision-makers working on the just transition.

Inequality underpins many of the transport options, not just cars, available to communities. As mentioned above, 19.4 percent of households in Wales currently don't have access to a car or van³⁶. However, other transport modes are also often disproportionately affecting those communities and exacerbating transport inequalities. For instance, typically train links are closer to more affluent areas whilst bus links are closer to less-affluent homes. And whilst children under the age of 11 have access to free train travel, and those under 16 can access free travel during off-peak times and when accompanied by a fare-paying adult in Wales (on TfW services³⁷), bus travel is under-subsidised in comparison to rail (although moves to a franchising model seek to address this financing gap³⁸).

Additionally, our transport systems are also linked to gender inequality, with women opting more often for public transport, not cars, but taking different journeys and travelling accompanied. Serious considerations should be taken when devising and planning for a transport system which is accessible, safe and affordable for women, families, disadvantaged communities, remote households and people with disabilities.

³⁴ [Stats Wales, 2023, Economic inactivity rates by UK country/English region and quarter](#)

³⁵ [National Centre for Social Research, 2019, Transport and inequality: An evidence review for the Department of Transport](#)

³⁶ [Office for National Statistics, Census 2021, Car or van availability by country \(Wales\) \[Accessed March 2024\]](#)

³⁷ [Transport for Wales, N.D., Kids go free on our trains](#)

³⁸ [Welsh Government, 2024, Bus Reform for Wales: our roadmap to franchising](#)

It is, therefore, clear that the challenge of making public transport options cheap, easy quick and accessible to everyone has a key role to play in creating a sustainable transport system for all - and this is evidenced by the current policy context in Wales, aiming to encourage people out of their cars and onto public transport.

Investment in our bus network

However, the question of investment in our public transport sector is an area of concern. To an extent, on rail transport, Welsh Government have delivered on their promises, with funding for Transport for Wales increasing in the last budget³⁹ despite a bleak economic context of a £900 million black hole in the government's overall budget⁴⁰. It is also worth acknowledging the significant investment in the South Wales Metro project⁴¹ and the electrification of the Core Valleys Line⁴².

For bus transport, actions so far do not meet the government's policy ambition. Wales is the UK nation with the most decreased bus services, despite having a Transport Strategy meant to support and encourage people to use buses more. Up to the outset of the pandemic, Wales' bus ridership had fallen further than anywhere in Britain since 2004⁴³. In 2004/05 local buses covered 129m kilometres, which has slowly declined to cover just 84m kilometres⁴⁴.

On top of this, bus cuts in Wales have impacted the poorest communities the most⁴⁵, and have further affected rural communities⁴⁶ and older people, who could face isolation and loneliness as a result⁴⁷.

Bus deregulation has led to a decline in services and increased fares in Wales since the 1980s⁴⁸. With fewer services available and the public sector stepping in to provide a lifeline to commercially failing services during Covid-19, the bus network is withering on the vine, despite it being a vital element of the vision for Wales' transport system of the future.

Without significant investment in the bus network, an uplift in its fortunes is unlikely. Therefore, plans for a Bus Bill from Welsh Government are welcome. Proposals include bus franchising throughout Wales, permitting local authorities to establish bus companies and to relax restrictions on existing municipal bus companies⁴⁹. These reforms acknowledge that current mechanisms to support bus routes are not working and present a vision for the future of services that have a public service dimension. This approach, which has seemingly delivered for London and Manchester, recognises the wider social and economic value that

³⁹ [Welsh Government, 2023, Addendum to Draft Budget 2023 to 2024](#)

⁴⁰ [Welsh Government, 2023, The £900m Budget Deficit](#)

⁴¹ UK Government,

⁴² [Transport for Wales, N.d., Transformation of the Core Valley Lines](#)

⁴³ [Wales Online, 2024, The glaring problem with transport in Welsh cities and how it could be solved](#)

⁴⁴ Ibid

⁴⁵ [Senedd Climate Change, Environment and Infrastructure Committee, 2022, The future of bus and rail in Wales](#)

⁴⁶ Ibid

⁴⁷ [Age Cymru, 2023, Reduced bus services could increase loneliness and isolation amongst older people, warns Age Cymr](#)

⁴⁸ [Centre for Cities, 2023, Fare outcomes: Understanding Transport in Wales' Cities](#)

⁴⁹ [Senedd Research, 2022, Plans for bus reform in Wales, Saved by the Bill or knock-out blow?](#)

bus services can add to communities. Nevertheless, the proof of the legislation will be in its implementation, with funding mechanisms necessary to ensure the provision of efficient, affordable and integrated bus timetables which take into account people's mobility and travel patterns. To maximise usability and accessibility, the bus network needs to deliver not only more services, but also simplified fares, better timetables and easier ticketing. The release of Welsh Government and Transport for Wales' *Our Roadmap to Bus Reform*⁵⁰, sets the tone for change ahead, although the response⁵¹ from the Confederation of Passenger Transport Cymru highlights how much adequate funding is of the essence. In principle bus reforms in Wales *should* enable unified, common ticketing which will help with attractiveness of it's offer.

A holistic approach to public transport

It is evident that public transport as a whole doesn't act as an integrated system. Too often in the past different forms of public transport have acted competitively with each other, rather than as complimentary services that are cogs in the same machine. With a larger role envisaged for the public sector in Wales to deliver and franchise services across the bus and rail networks, there is potential for designing an interlinked system, with integrated ticketing solutions, timetabling and services planned on a multimodal basis.

Micro-mobility solutions

Within this integrated system it is useful to provide clarity on the role of micro-mobility solutions which remain in a state of legislative limbo. The roundtable attendees were split, as much of the population is, on their usage. For some, micro-mobility solutions such as e-scooters can be vital in enabling people to make their first and last mile connections between sustainable transport modes, enabling wider modal shift⁵². For others, they don't have a positive impact on the desired modal shift, displacing people from active travel rather than replacing private car usage, and can be deemed less safe than forms of active travel (with a heightened risk of more severe injury). Whatever the perspective, there is much needed clarity on what the role of these solutions is. Llwybr Newydd states that Welsh Government will look at new forms of micro-mobility solutions and work with UK partners on a 'regulatory framework'⁵³. But beyond legislation, a plan for these technologies is needed, as they are already in widespread use, especially in urban environments in Wales.

Demand-responsive transport

The role of demand-responsive transport was also mentioned, acknowledging that private car ownership may not be the way forward for the future. Instead, the expansion of mobility as a service, could represent the opportunity to delink car-ownership from accessing services. Such a move could also enable access to cars for those who can't afford to own and maintain one themselves. Car clubs have started to be seen in urban areas in Wales, but could be rapidly expanded if they prove a successful model. Any efforts to move away from private car ownership towards mobility as a service would, naturally, have to align with the

⁵⁰ [Welsh Government and Transport for Wales, 2024, Our Roadmap for Bus Reform: Towards One Network, One Timetable, One Ticket](#)

⁵¹ [CPT Cymru, 2024, 'Regulatory change alone will not change the economic reality of delivering bus services,' says CPT Cymru Director Aaron Hill](#)

⁵² [Intelligent Transport, 2022, Micro-Mobility: The unexpected player in delivering modal shift?](#)

⁵³ [Welsh Government, 2021, Llwybr Newydd - Wales Transport Strategy](#)

goal of getting more petrol and diesel vehicles off the road and reducing the number of miles driven. Taking cars off of the road also enables a radical reallocation of road space and a rethinking of what our communities look like and how we can make them safer and more accessible for people to travel actively in.

Low Traffic Neighbourhoods

The above links directly to another policy solution discussed during the event: low traffic neighbourhoods (LTNs). LTNs are areas where motor vehicle traffic is greatly reduced⁵⁴. The aim is to create safer streets for those travelling actively and reduce noise and air pollution in the areas where people live. The concept is aligned with the principle of 20-minute neighbourhoods, that is, areas where people can meet their everyday needs within a twenty minute walk⁵⁵. Such interventions, which offer a policy carrot as well as a stick, will be vital to enable a modal shift. Yes, LTN's put up barriers to using a car and make driving a less convenient option, but they also offer to transform communities through creating spaces for socialising and play, and the opportunity to provide green street infrastructure.

It is important to state here that Welsh Government has demonstrated a commitment to align spending to their sustainable vision of our transport system. The UK Climate Change Committee progress report on reducing emissions in Wales recognises that Wales has committed four times as much funding per capita to active travel as the UK Government⁵⁶. Yet, the links between transport, inequality and investment need further thought.

Behavioural change

A main topic of discussion at the roundtable focused on the need for a behavioural change: the great enabler and inhibitor of Wales' transport sector transformation, and the challenges to progress it represents; that is, convincing and encouraging people to transition to more sustainable modes of transport for their everyday journeys.

Roundtable participants recognised the transformation of policy priorities at Welsh Government level, and that they offer to go further and faster than other UK nations. But there remains a significant delivery gap. Recent public backlash to transport policies like the 20mph policy highlights the importance of a behavioural change and the challenge of bringing people along on the journey to net zero - adequately engaging and educating the public at every level of research and decision-making, which will get increasingly difficult as we move closer to 2050.

There was also a recognition that the Welsh Labour Government has spent political capital on transport policy decisions over recent years. Taking a different line to the dominant UK narrative on transport and the tough decisions the sector will have to make as Wales transitions to net zero has not been without its difficulties. This has brought politics into policy, complicating the decision-making processes at all levels of government. The fact that Welsh Government has had a Deputy Climate Change Minister, with responsibility for transport (in Lee Waters MS), who is supportive of reimagining the transport system has been a benefit in policy terms. As this role changes hands, to Ken Skates, Cabinet Secretary

⁵⁴ [Sustrans, 2020. What is a low traffic neighbourhood?](#)

⁵⁵ [Living Streets, 2023. 20-minute neighbourhoods: A community perspective](#)

⁵⁶ [UK Climate Change Committee, 2023. Progress Report: Reducing Emissions in Wales](#)

for North Wales and Transport⁵⁷, the hope is that the current trajectory is maintained whilst improving delivery at pace. The direction of travel on transport requires long-term policy commitment which goes beyond political leadership. A focus on decarbonisation of the transport system must remain a Welsh Government priority for the next 15 years, with the scale of change required only increasing.

When it comes to wider behavioural change initiatives, roundtable participants relayed that we have to go further with their rollout. Across government, there is limited knowledge in the application of social change campaigns, the type of which are required for Wales' transport system, which, along with lack of resources, has had an impact on the take-up of wider policy initiatives. Investing in capacity to expand behavioural change expertise in government and delivery partners could have a halo effect on policy outcomes. This upskilling of the public sector is equally needed in Local Authorities in Wales, with a lack of resources set aside at to implement projects which meet Welsh Government policy. The fact that transport spending can be revenue and capital is also an under-utilised option. Local Authorities' capacity, capability and commitment to delivering projects which meet Welsh Government's vision for transport has led to a patchwork of delivery on the ground, which will need to be addressed over the next decade. Only through collaborative working on all levels of government in Wales can we meet the scale and pace of transport decarbonisation and transformation.

Marketing for the behavioural change

When it comes to behavioural change marketing, the cross-benefits of a more active and sustainable transport system should be emphasised. Particularly the link between health and active travel or health and lower-emission transport alternatives. Utilising public health as a key driver could have a stronger impact than messaging solely focused on climate. Equally, framing around supporting the local economy could be fruitful. Living Streets *Pedestrian Pound* report⁵⁸ and Sustrans' *Walking and Cycling Index*⁵⁹ highlight the benefits to local economies, and the foundational economy specifically, of enhancing active travel in communities. A more sustainable transport system, which is less car dependent isn't only an environmental benefit, it aids health and local economies, and makes our communities safer and more liveable.

Communicating the *need* for change to the transport sector is also a key challenge. Highlighting positive stories which demonstrate the value of the shift to a more sustainable transport system is crucial. Ensuring a diverse range of voices *in* and *informing* the transport policy space in Wales is also vital - the lived experiences of women, people of colour, disabled people, and people from disadvantaged backgrounds, are only some of the underrepresented groups in the transport sector, but also some of the most affected by its current and future models. If we want decisions to be accepted by the people of Wales, then those decisions need to be made with input from a representative group of those people.

It is also important to note that behavioural change is required on two levels: effectively communicating with the public to promote sustainable transport modes, whilst also making the case for change for policy makers and local decision-makers who are responsible for the

⁵⁷ [Welsh Government. 2024. Cabinet Secretaries and Ministers](#)

⁵⁸ [Living Streets. 2018. The Pedestrian Pound](#)

⁵⁹ [Sustrans. 2022. Walking and Cycling Index 2021: UK report](#)

rollout of transport planning and infrastructure projects across the nation. Many of the levers for delivering transport initiatives sit with Local Authorities, or increasingly Corporate Joint Committees. In each of them there are stakeholders and decision-makers who have a huge impact not only on the delivery of projects, but also on the allocation of funds, and the design and implementation of these projects. All of this results in the tangible articulation of Welsh Government policy. If there is a misalignment between Welsh and Local Government, then delivery of transport projects is undermined.

There was also an acknowledgement that, as per the UK Climate Change Committee's net zero pathways highlight, the reform across our lives, including in transport, to reach net zero will increase over the next two decades. Frontloading our activities in this decade means that we can access the benefits of a more sustainable transport system quicker, gaining from first mover advantage. It is therefore important that we change the narrative from 'tinkering' to 'transformation', as one roundtable attendee aptly put it. But such transformation needs to treat pushback and concern from the public with respect. Social cohesion and public consent represent roadblocks to transformative change - they cannot simply be ignored or wished away. Investment in communication and behavioural change are central to the effective delivery of change.

This applies to transport, but also to many of the issues surrounding public acceptance of the net zero transition. As set out in the final report of the Independent Commission on the Constitutional Future of Wales⁶⁰, there is a need to investigate how to embed 'democratic innovation and inclusive community engagement in Wales'. Deliberative methods of engagement, such as citizens' assemblies, could play an important role in attempting to understand the challenges people see with reform of our transport system, as well as seeing potentially untapped opportunities for embedding behavioural change. As in other nations, like Ireland, deliberative methods could be best utilised in areas of policy which are politically contentious, which has been the case with transport policy in Wales over recent years. Diffusing the tension in the policy environment would benefit everyone. Deliberative mechanisms can also help to mitigate the lack of representation of those currently working in the transport sector. Ensuring that a representative body of individuals have helped contribute to policy is of distinct value when attempting to create a system which truly works for all, including those currently frozen out of contributing, such as those living in poverty, disabled people, young people and older people to name but a few.

Securing transport investment, policy and delivery is reliant on the accurate and timely collection of data. Without adequate monitoring and data collection, it is difficult to ascertain the effectiveness of transport policy to date. A lot has changed over the last decade and yet, a National Transport Survey has not been undertaken. Whilst the next National Transport Survey is due to be conducted in 2024⁶¹, this wait isn't adequate to drive impactful and evidence-informed policy. This is contrasted to the amount of data collected in England by their National Travel Survey⁶², which take place every year. Frequency of data collection can help Government gain a greater depth of understanding over the transport system and more accurately see the results of policy. Richer data sets create the conditions for better policy and better outcomes.

⁶⁰ [Independent Commission on the Constitutional Future of Wales, 2024. Final Report](#)

⁶¹ [Transport for Wales, N.d., Wales National Travel Survey](#)

⁶² [UK Government, 2023. National Travel Survey 2022](#)

To conclude, the second part of this roundtable focused on transport and equality. There was consensus in the room on a shared focus of transport policy and delivery in Wales to prioritising decarbonisation and addressing inequality. Much of the conversation highlighted key issues and areas where more could be done to tackle transport inequality and decarbonisation simultaneously.

Priority areas for action

During the final session of the day, participants focused on call to action and next steps, identifying collectively what funds are already in the transport system that could be put to better use and what policy shifts they would like to see implemented.

This discussion aimed to operationalise some of the principles discussed in the preceding two sessions, identifying key policy blockers and enablers to change.

Importantly, this conversation began with the acknowledgement of the limitations of the delineation of powers sitting across devolved and reserved competency. Attendees, therefore, focused on what actors are currently within Wales competency, whilst acknowledging the areas where UK Government have control, such as subsidy and grant-making regimes. The focus was on what the biggest, fairest difference policy could make to people's lives in Wales.

Broadly speaking, roundtable attendees agreed on a shared vision for transport in Wales: a system that is more sustainable, accessible and affordable for all, and that connects people to the places they need to go to live happy and fulfilling lives.

Below is a snapshot of some of the ideas put forward by attendees, which have fed into the report's recommendations:

A number of participants acknowledged that all actors in Wales have been successful in selling a vision for change to the transport system and gaining support and buy-in for this vision. But we need to go further and faster.

Behavioural change was again seen as a key issue. Some ideas for aiding behavioural change in Wales included strengthening the link between how we travel and health outcomes. Communicating that health and transport are inextricably linked was seen as key, especially as forecasting healthcare spend in Wales highlights budgetary pressures if healthier lifestyles are not prioritised. In missing the public health benefits of a more active and sustainable transport system in Wales, we are not showing the real benefits (and negatives) of change. With this in mind, health sector budgets could be better targeted at prevention at large.

Additionally, establishing key principles on the impact transport has on public health and wellbeing should also be part of initial and ongoing training for NHS Wales and public sector planning staff. Such systems level thinking should lead to delivery of projects that are more in line with Welsh Government's vision for a more sustainable system.

The positive impact that employers in Wales can play in behavioural change was also identified by a number of participants. Many highlighted the important role that employers

in Wales can play in strongly articulating transforming transport habits of their workforce. With 30 percent of employees working in the public sector in Wales⁶³ (above that of the UK average of 24 per cent⁶⁴), the public sector has a greater role in evidencing best practice. This is especially the case given public bodies fall within the scope of the Wellbeing of Future Generations Act. Indeed, transport systems change was highlighted as an area of focus for the first Future Generations Commissioner⁶⁵. Such efforts should also clearly display how public bodies can best understand and deliver against *Llwybr Newydd* and foregrounding the vital role public bodies have for creating the conditions for transformative change.

Additionally, private sector employers have a vital role to play, with more to be done to encourage and display best practice in embedding more sustainable transport decisions from employees. Going above and beyond offering access to the Cycle to Work scheme⁶⁶. Examples of activities to support more sustainable transport decisions from employees could include; providing access to pool bikes for work journeys, bike maintenance sessions, highlighting public transport options, access to e-car club rental schemes, ensuring transport forms part of staff induction packages and subsidising public transport discount cards. With 82 percent of people in Wales reporting the car as their usual mode of getting to work⁶⁷, there is substantial room for improvement in linking workplaces to wider behavioural change initiatives.

The above does not include the critical consideration of employers; that of where to locate their workplaces. Places of work should, where possible, be chosen relative to sustainable transport facilities. Whether that is access to a bus or railway station or having good access to active travel routes, where employers situate their workforce can have a large impact on the ability for employees to travel more sustainably. Making more sustainable transport options an easier, more cost effective choice can therefore be greatly enabled by where employers are physically located. Planning of communities which places transport as a key consideration should trickle down from government and public policy into organisations.

Further initiatives offered by employers to promote sustainable transport should also ensure to be inclusive to all groups, exploring which support would be best of value. For example, supporting the use of e-scooters may be a scheme that would work for younger people, but miss others. Typically, a mix of approaches would be preferable to ensure the inclusion of all.

The need to go beyond tackling transport poverty to delivering transport equality was strongly articulated. Delivering policies with access and inclusion, such as a fit-for-purpose pavement strategy can be seen through this lens.

With all policy proposals, the need to treat rural and urban areas differently in their journeys to net zero was foregrounded. Making hard decisions about what to prioritise where will be crucial. More rural, car dependent communities may see their systems best decarbonised through decarbonising private cars (along with the support to enable this to be rolled out in a

⁶³ [StatsWales, 2023, Employment in the public and private sectors by Welsh local authority and status](#)

⁶⁴ Ibid

⁶⁵ [Future Generations Commissioner for Wales, 2020, The Future Generations Report 2020: Chapter 5 - Transport](#)

⁶⁶ [Cycle to Work, N.D, The cycle to work scheme](#)

⁶⁷ [Welsh Government, 2021, Wellbeing of Wales national indicators: Percentage of journeys by walking, cycling and public transport](#)

fair and just manner), whereas more urban or semi-urban areas will see a greater role for a modal shift onto an enhanced public transport offer. As such, whilst there is a clear national direction of travel, there must be flexibility to enable different pathways to reaching net zero in the transport sector, which take into account local and regional challenges and opportunities.

Another suggestion was a greater integration of sustainable transport modes, that is a wayfinding system which suggests the most sustainable way of making a trip, including bus, rail and active travel options, across a common system as per Transport for London.

The role that deliberative democratic methods could be used to drive forward policy decisions in Wales informed by people was also discussed. Such a system should be honest and upfront about the urgency of delivering net zero in Wales.

The need for better collection and usage of transport data to drive better policy making received support from attendees. The fact that the National Transport Survey hasn't been conducted in over a decade (acknowledging that this is in the process of being undertaken) highlights a severe lack of data. The insight from data is vital to inform the transformation of Wales' transport sector, and to ultimately ascertain if the policy intention is being delivered. Importantly, data should be made publicly available to drive a public and private discourse on transport policy, which impacts everyone's lives in Wales.

Data should also better align with what we want to get out of our transport system. If data collection and measurement doesn't consider wellbeing benefits or improving accessibility of transport interventions, for example, then we will not know how well projects deliver for communities.

Communicating successful delivery in a manner which is data-informed is also important, especially for Local Authorities and their private sector delivery partners. This should ensure quality of delivery, and will help make tangible policy intentions focused on sustainable transport infrastructure which delivers a wide suite of benefits to living standards and wellbeing.

The need for stronger and more specific targets to guide delivery and investment was noted by a number of roundtable participants. Whilst there are strong targets in some policy areas, such as modal shift, others lack specificity. With most transport projects delivered by a consortium, having certainty on the direction of travel on investment and strategy is essential.

Alongside specific targets, a clear articulation of the role that the private sector can play in funding and delivering transport projects is necessary. Making projects and an overarching system that is more attractive to the private sector is also important, given that Welsh Government has, to some extent, limited the ability of government to deliver transformative projects on timescales set out by *LLwybr Newydd* and the National Transport Delivery Plan⁶⁸. With aforementioned budgetary constraints, the role of private sector funding and finance is increased, with Welsh Government targets to certain extents dependent on collaboration with the private sector.

⁶⁸ [Welsh Government. 2022. National Transport Delivery Plan 2022-2027](#)

In regards to funding and delivery, the important role the third sector can play as delivery partners was also raised. Despite Welsh Government budget cuts, projects that support behavioural change, such as Sustrans Cymru's E-Move project⁶⁹ are having a big impact. If Local Authorities could also reallocate budget into such schemes, this should be explored as an opportunity.

A roundtable participant explained how the 'Green Book', the guidance issued by the UK Treasury on how to appraise policies, programmes and projects⁷⁰, isn't working effectively. It was argued that the 'Green Book' acts to drive the private sector away from the public sector in its approach. With the private sector vital for financing and delivering the decarbonisation of Wales' transport system, this is a worrying portrayal. As such, there is a need to ensure the 'Green Book' acts to incentivise private-public sector partnership, rather than undermine it. It was felt that the 'Green Book' needs to closer align with the broader impacts of transport projects, such as improving health and wellbeing in communities. The Welsh Transport Appraisal Guidance (or WelTAG) does better in terms of making this connection, but it is still based on the underlying principles of the 'Green Book'⁷¹.

In this vein, due to budgetary pressures and constricted fiscal levers, Welsh Government needs to ensure that whatever money is in the transport system, is used to create impact. This can be achieved through targeted investment where people live and how they get to the places they need to go. This question of money in the system and 'who pays for what' in terms of transport in Wales, given the delineation of powers and funding, is a point articulated well by roundtable attendee Prof. Stuart Cole CBE in a piece in Nation Cymru⁷².

Finally, it was reflected that the newly established Corporate Joint Committees will have a critical role to play in producing Regional Transport Plans⁷³. Importantly, each CJC will have their own transport vision and priorities for their regions, yet, they will need to link together at all boundaries as transport flows across these daily. As such, the work of CJCs should act to broaden regional coordination on transport investment and planning, working in close alignment with all other areas of government. Using these new legal bodies, with significant amounts of funding and powers in their regions, to best drive transport decarbonisation will be key to success.

In conclusion, in this final discussion, participants put forward practical means to achieve a more just and sustainable transport system in Wales. Each aimed to be practical and based on the participants' experiences in delivering or researching transport projects in Wales. Importantly, each suggestion identified areas within Welsh Government control which are deliverable through policy or funding decisions. These suggestions have fed directly into this report's recommendations, which are set out below.

⁶⁹ [Sustrans Cymru. 2023. Analysing the success of the E-Move community e-cycle project](#)

⁷⁰ [UK Treasury. 2023. The Green Book \(2022\)](#)

⁷¹ [Welsh Government. 2024. Wales Transport Appraisal Guidance WelTAG](#)

⁷² [Prof. Stuart Cole CBE. 2024. Who pays for sustainable transport? \[In Nation Cymru\]](#)

⁷³ [Welsh Government. 2023. Guidance to Corporate Joint Committees on Regional Transport Plans](#)

Expanded recommendations

1. Welsh Government should consider policy benefits to encourage a behavioural change and get communities on board with its decisions

Too many transport decisions are perceived as a cost to users. Welsh Government should consider what benefits they can provide to users to encourage the shift to sustainable transport modes, beyond ensuring baseline service provision. Policies should enable initiatives which have been successful elsewhere: access to car sharing, demand-responsive transport, on-street, safe cycle parking, reallocation of road space for active travel and public transport, community transport solutions, public transport ticketing suited to underrepresented groups (such as parents), and wayfinding apps, amongst others.

2. Government at all levels should invest in behavioural change to meet ambitious Welsh Government targets on modal shift

Costs for transport should cut across capital and revenue. There is a vital need to reallocate funding towards behaviour change initiatives. This could happen by Local Authorities refocusing parts of their budget into behavioural change initiatives, to engender a modal shift. Welsh Government should allocate a specific funding mechanism for establishing such schemes. This funding could come from the reallocation of the Welsh Government budget that currently doesn't go to transport. For example, increasing active travel can act to relieve *some* pressure from the health service. As we move towards a more preventative health system, then allocation towards preventative measures has to be a part of the future.

3. Welsh Government should explore democratic mechanisms to provide pathways for change

The fallout from the 20mph policy highlights a discord in how policy is being communicated to the public. With future transport initiatives intending to decarbonise the system inherently becoming increasingly ambitious, there is a vital need to explore democratic mechanisms, such as citizens' assemblies, for gaining insight into how policy is interpreted by the public.

4. Local Authorities and CJC's should accelerate the transition to transport-oriented development

Whilst Priority 1 of Llywbr Newydd⁷⁴ is to 'bring services to people in order to reduce the need to travel,' there is a need to accelerate the transition towards transport-orientated land use and development. For too long the way we design our communities sees development lead transport, with transport options looking to solve problems presented in planning and development. We urgently need to see this approach flipped on its head, with the availability of sustainable transport options driving where we develop places. Whilst there are beginning to be good examples of this approach, particularly with the South Wales Metro investment⁷⁵, although there remain challenges ahead⁷⁶. Whilst the policy promotes this approach, more must be done by Local Authorities and emerging CJC's in living up to the policy-theory of transit oriented development. Only by doing so can we unleash the potential of widespread behaviour change towards sustainable transport modes.

⁷⁴ [Welsh Government, 2021, Llywbr Newydd - Wales Transport Strategy](#)

⁷⁵ [Transport for Wales, 2018, Rolling out our Metro](#)

⁷⁶ [Mark Barry, 2019, Transit Oriented Development in the Cardiff Capital Region](#); and; [Mark Barry, 2024, Wales. Metro. TOD & Devolution](#)

5. Buses - deliver a network that is adequately funded and with public benefit at its heart

Ongoing bus reforms represent an opportunity to deliver a bus system which is fit for the nation's transport needs, but adequate funding will be necessary to deliver a vision for bus services which will meet the modal shift targets.

6. Supercharge transport data collection: data collection that fits policy ambitions

Data collection for our transport system needs to fit the aims of our transport policy - without robust data management, we don't know whether policy and investment has the required impact. We recommend the expansion of the speed and volume of data collection on Wales' transport sector. The broader aims of transport policy in Wales also require cross-cutting data, for example, on transport investment's impact on living standards and local economic outcomes as well as its impact on the nation's net zero pathway.

7. Welsh Government should establish best practice for employers to support sustainable transport modes in their organisation

More can be done to empower employers to play a key role in enabling a modal shift. Interventions like: cycle to work schemes, supporting car clubs, providing access to secure cycle parking, giving work-based benefits to sustainable travellers, can be best achieved through employers. They represent a missing link in behavioural change strategies to date. Welsh Government should work with Trade Unions and experts in the field of behavioural change to establish what best practice on such initiatives looks like. Within this, the role of employers locating their businesses in premises with good access to sustainable transport modes is also vital. Likewise is encouraging workplace practices which enable employees to embed flexible travel patterns, to avoid transport-related delays.

8. Welsh Government should create stronger targets to better direct transport delivery outcomes

Welsh Government has a number of strong targets for transport sector decarbonisation and modal shift. However, more specific targets, accompanied by action, are needed to embed long-term, sustained reallocation of funding towards more sustainable transport modes. These targets should quantitatively align to Wales' net zero carbon budgets. Targets shape outcomes. Importantly, doing so engenders trust and support from the private sector who will be a vital delivery partner in transport's net zero transition.

9. Invest in public sector training initiatives to support transport sector change

We must do more to entrench behavioural change and reorientate our approach to transport. Welsh Government should properly fund public sector training on the impact of transport on health, wellbeing and economic outcomes, for example to NHS and Local Authority planning staff. Were these rollouts successful, they should be rolled out in appropriate public sector settings as a next step.

10. Welsh Government should continue the positive policy direction on transport - feeding into a broader consideration of value when appraising transport projects at all levels

Wales has made significant progress on creating progressive transport policy over recent years. However, with a change of Government, Welsh Government must continue to show

political leadership on transport decarbonisation. A key part of enabling delivery of this Government's transport agenda at pace is communicating that transport projects should be planned and analysed with consideration of their wider benefit to communities, including health, wellbeing and local economic impact of sustainable transport schemes. Enabling the private sector and Local Authorities to use the opportunities afforded by WelTAG to create projects which contribute to decarbonisation of Wales transport sector is substantially enhanced by political leadership. Strong leadership of projects, programmes and policies should also seek to interpret the HM Treasury Green Book to ensure that the transport appraisal process reflects Welsh values and addresses well-being, as advocated in the latest WelTAG.

11. Utilise the CJC process to maximise regional decision making on transport

As new institutions granted new powers, especially over transport, CJsCs will have to adapt quickly to fulfil their new roles in regional transport planning:

- Incubate best practice from local authority transport planning
- Work collaboratively across local authority boundaries
- Incorporate key Welsh Government transport policies at regional level
- Make the link between economic outcomes and access to affordable, sustainable and accessible transport options
- Prioritise sustainable land use and planning
- Beyond that - there is a distinct role for CJC's to play in the 10 preceding recommendations.

Ends

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