

Modal Shift in Wales

Moving from Targets to Implementation



Clare Sheffield & Daniel McCool

12th March 2024



Overview

- Context: Mode Shift Targets in Wales
- Key Ingredients of a Successful Transition
- Conclusions



Clare Sheffield

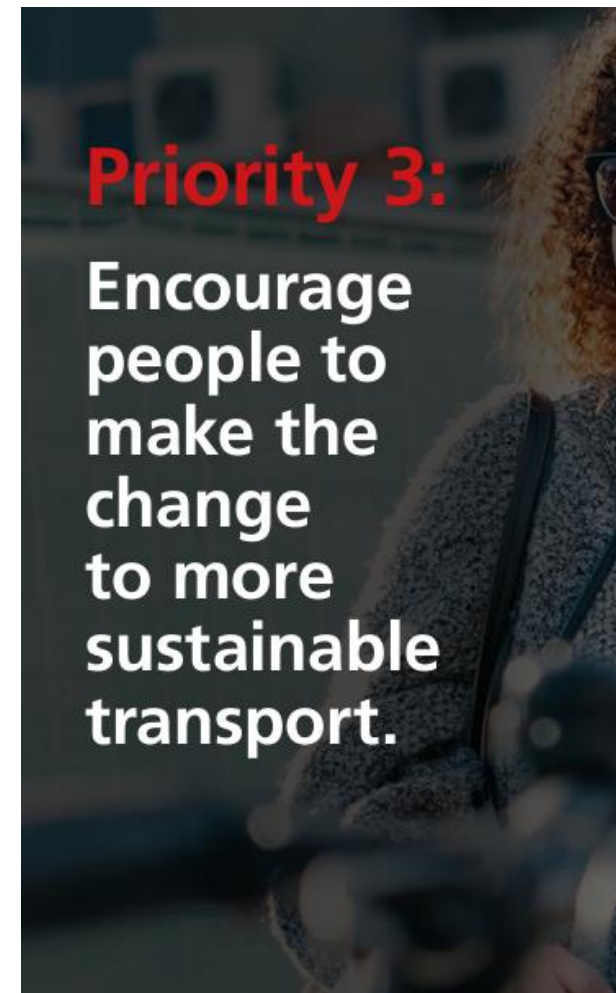
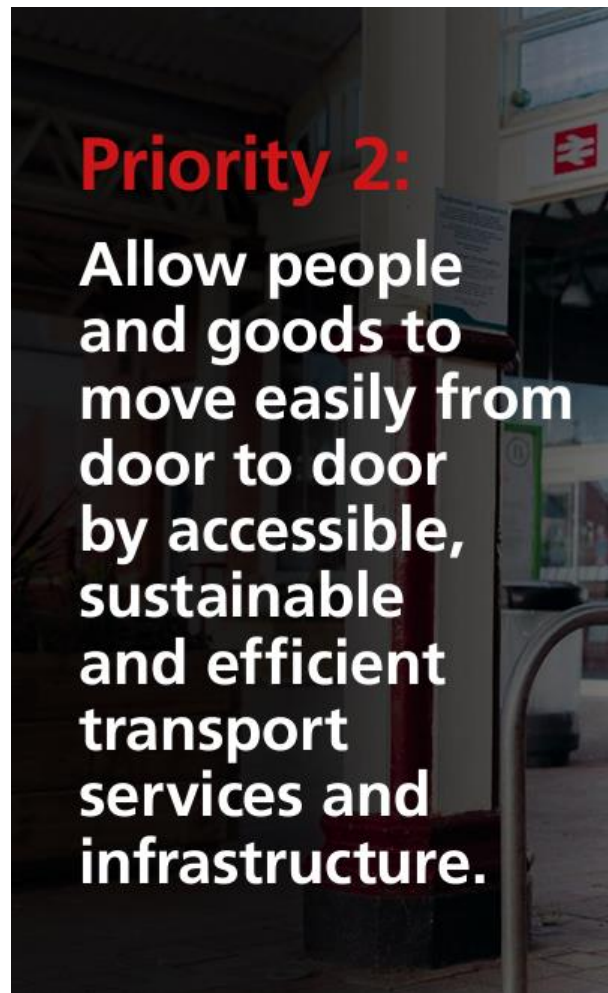
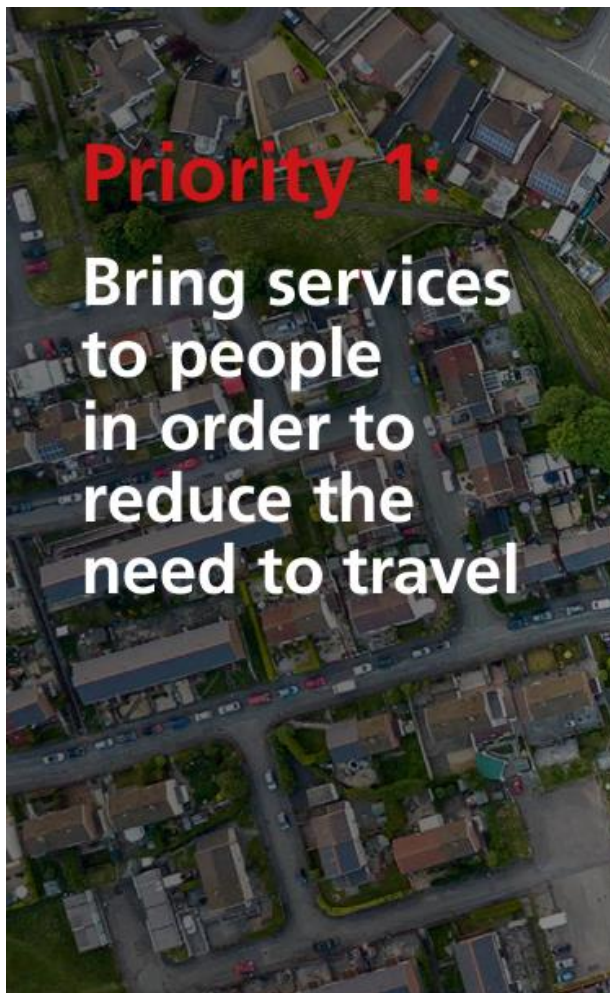
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Llwybr Newydd sets out three headline priorities for the next five years – the focus today is on mode shift of passenger journeys



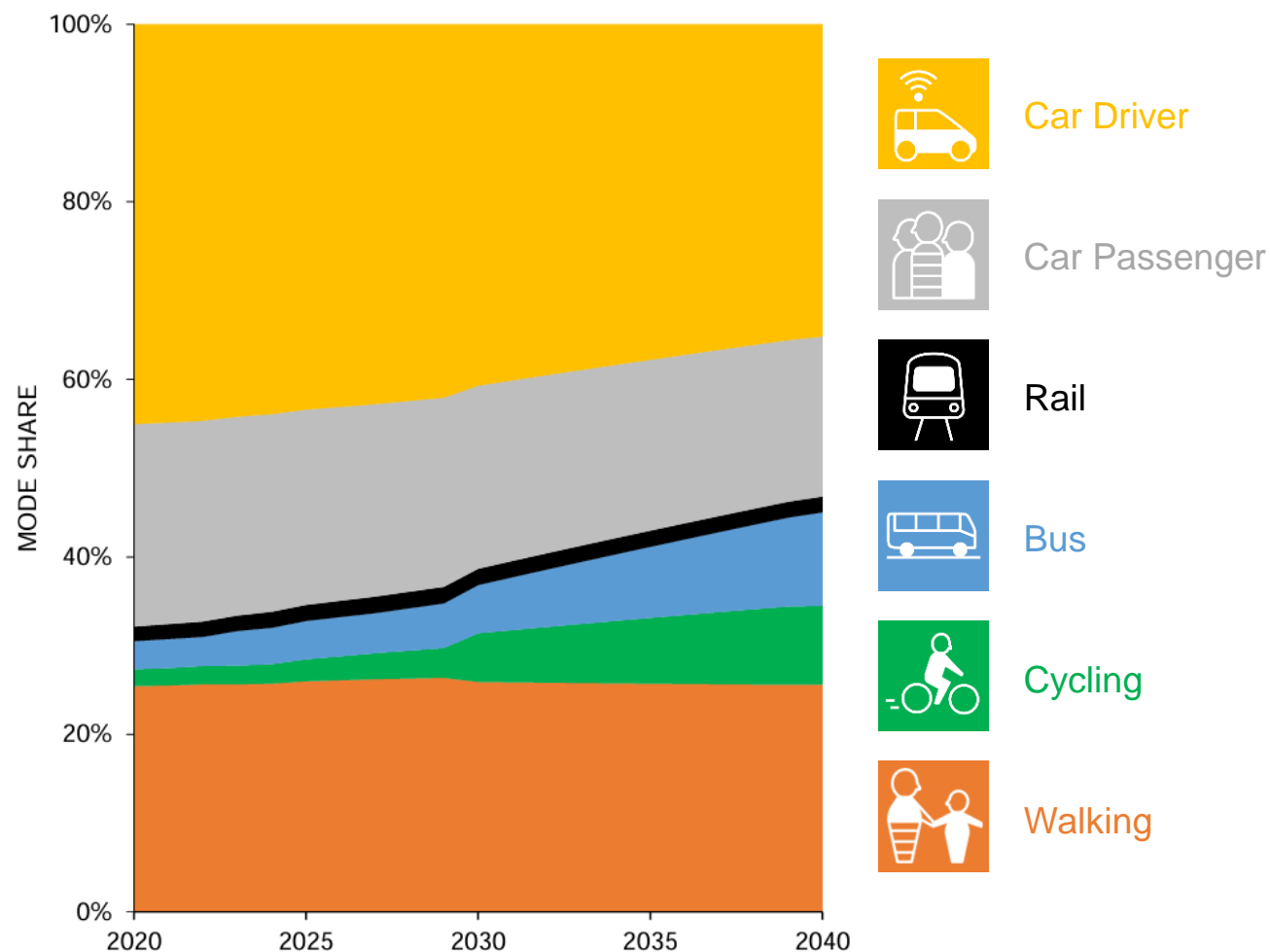
Clear policy alignment around targets as set out within Llwybr Newydd / Net Zero Wales / WelTAG 2024

Source: WelTAG 2024 Guidance, p.6

Sustainable transport targets in Wales				
Transport Targets	2019 baseline	2025	2030	2040
Modal shift target (Wales Transport Strategy)	32%			45% journeys by walking, cycling or public transport
Updated modal shift targets (Net Zero Wales)	32% journeys by walking, cycling or public transport	35% of journeys by sustainable modes	39% journeys by walking, cycling or public transport	
	27% active travel and 5% public transport		33% active travel and 7% public transport ¹	35% active travel and 13% public transport
Car Mileage reductions (Net Zero Wales)	10,186 Vehicle Km per person		Reduce car miles travelled per person by 10% by 2030 from 2019 levels	

Analysis undertaken to inform targets highlights potential of significant growth in bus and cycling

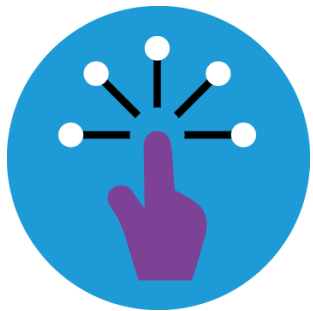
Source: Modal share targets for Wales, Transport for Quality of Life, January 2021 ([link](#))



Key conclusions:

- Reduce car miles travelled per person by 10% by 2030 from 2019 levels
- Cycling from 2% → 9% by 2040
- Bus from 3% to 11% by 2040

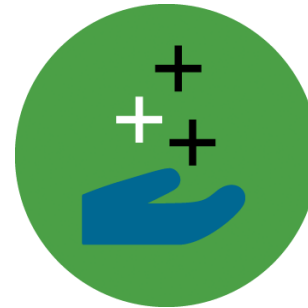
Key ingredients of a successful modal transition...



1. Credible
Vision / Plan



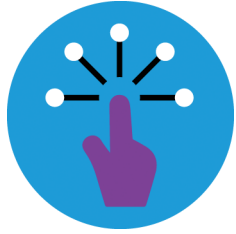
2. Consensus



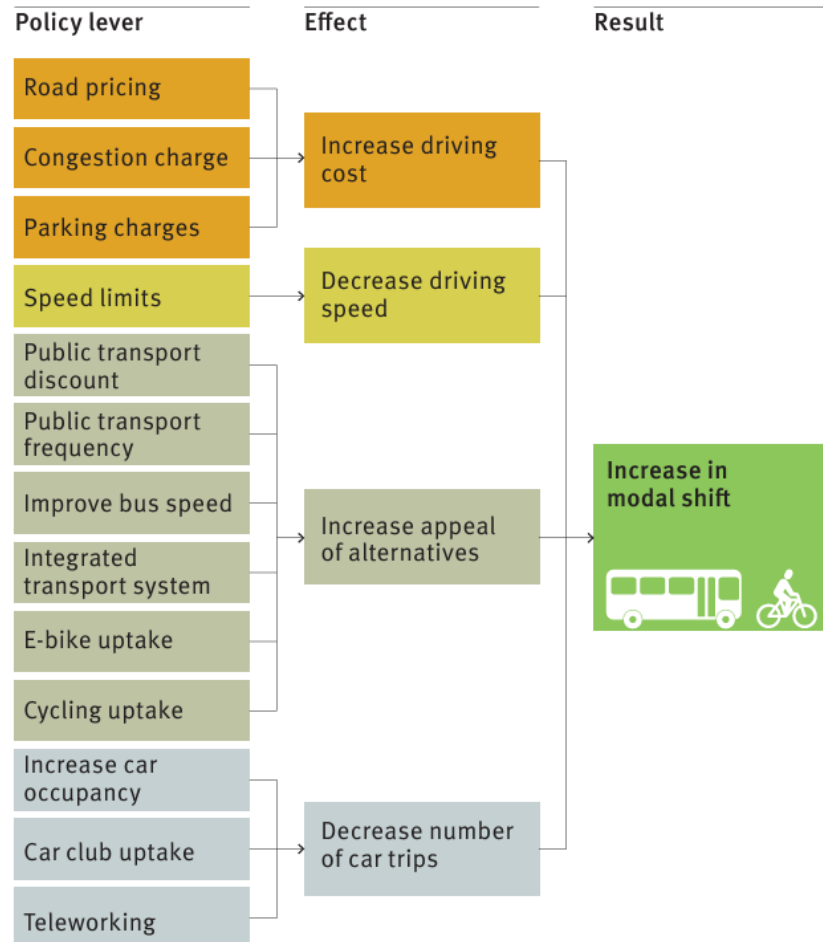
3. Finance



4. Data



We have a credible vision but there is still work to do

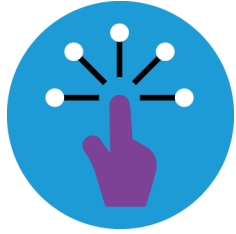


What's working well?

- Clear policy alignment, linked to addressing the climate emergency
- Action across various policies: Bus reform, default speed limit, active travel infrastructure, Metro etc

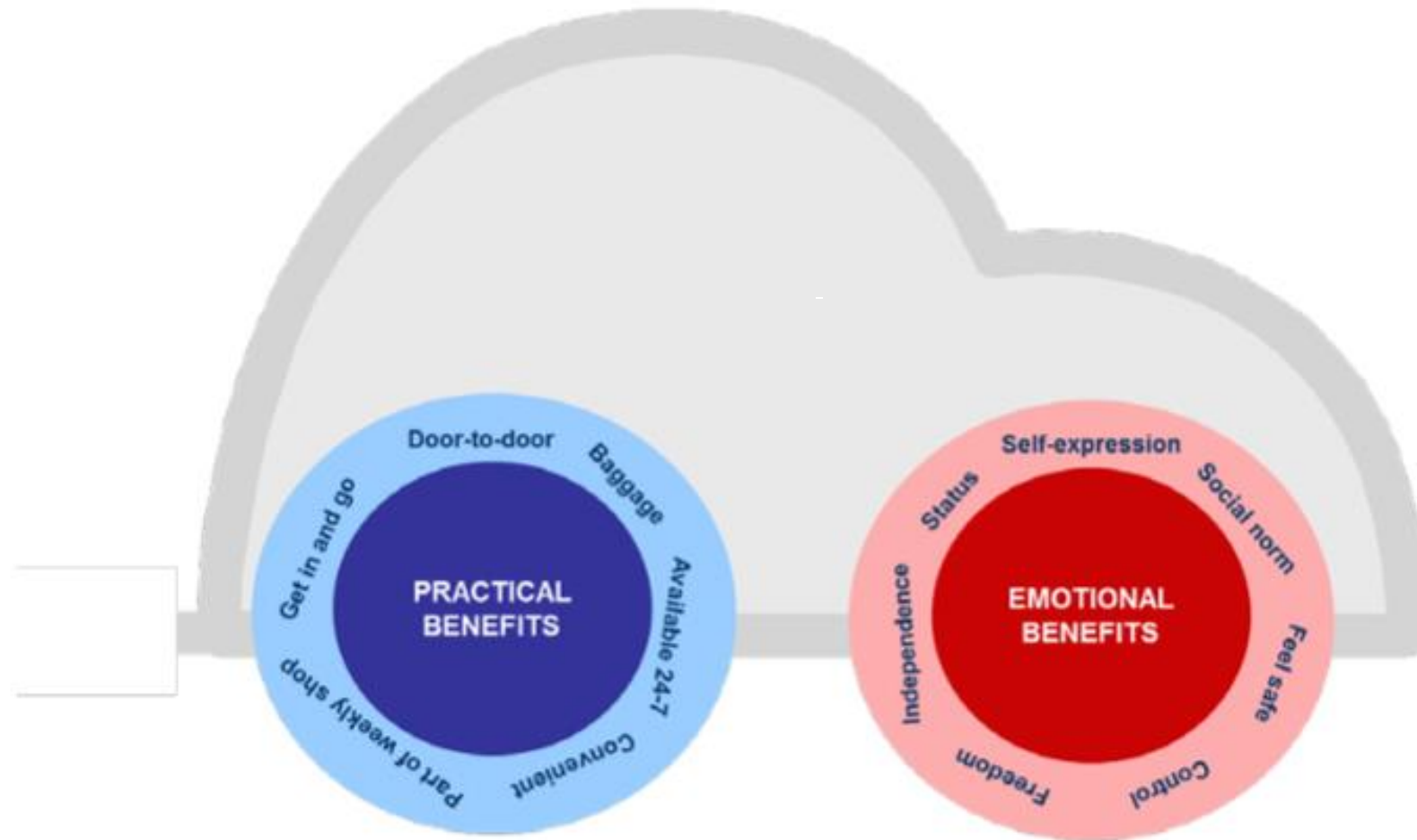
More to be done?

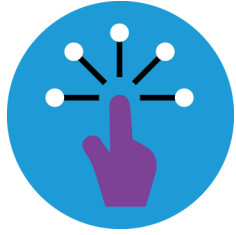
- Consideration of measures to manage demand for driving
- Build on work done to date to take a person-based approach to planning alternatives so they are appealing
- Better integration of policy across policy portfolios e.g. land use / transport integration



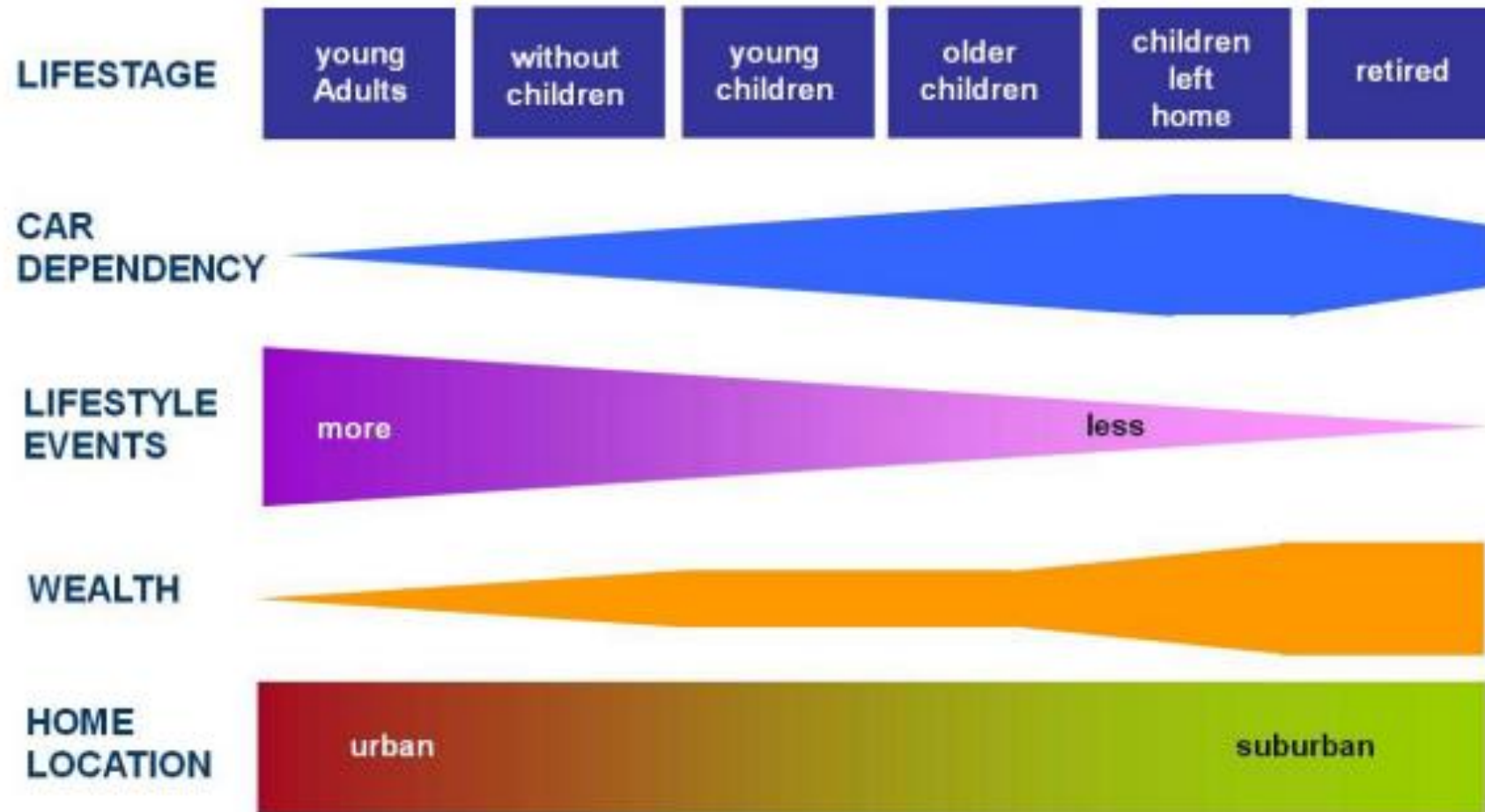
Delivering behaviour change is hard when car remains the best option for many people for much of the time

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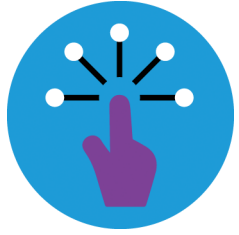
Over our lives, we typically become more car dependent and less likely to change our habits



Key triggers of travel behaviour change:

- Changes in home, job and life stage
- Changes in health or mobility
- Changes in available income or costs
- Changes in service availability or quality
- The desire to make a lifestyle change

Source: Car Ownership and Use Exploratory study (SDG 2008)



Diverse travel needs for individuals across Wales –should we target some user groups over others?



Predictable
Pat

Steady
Sandeep

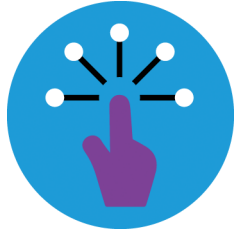
Busy
Bethan

Explorer
Eli

Nimble
Niall

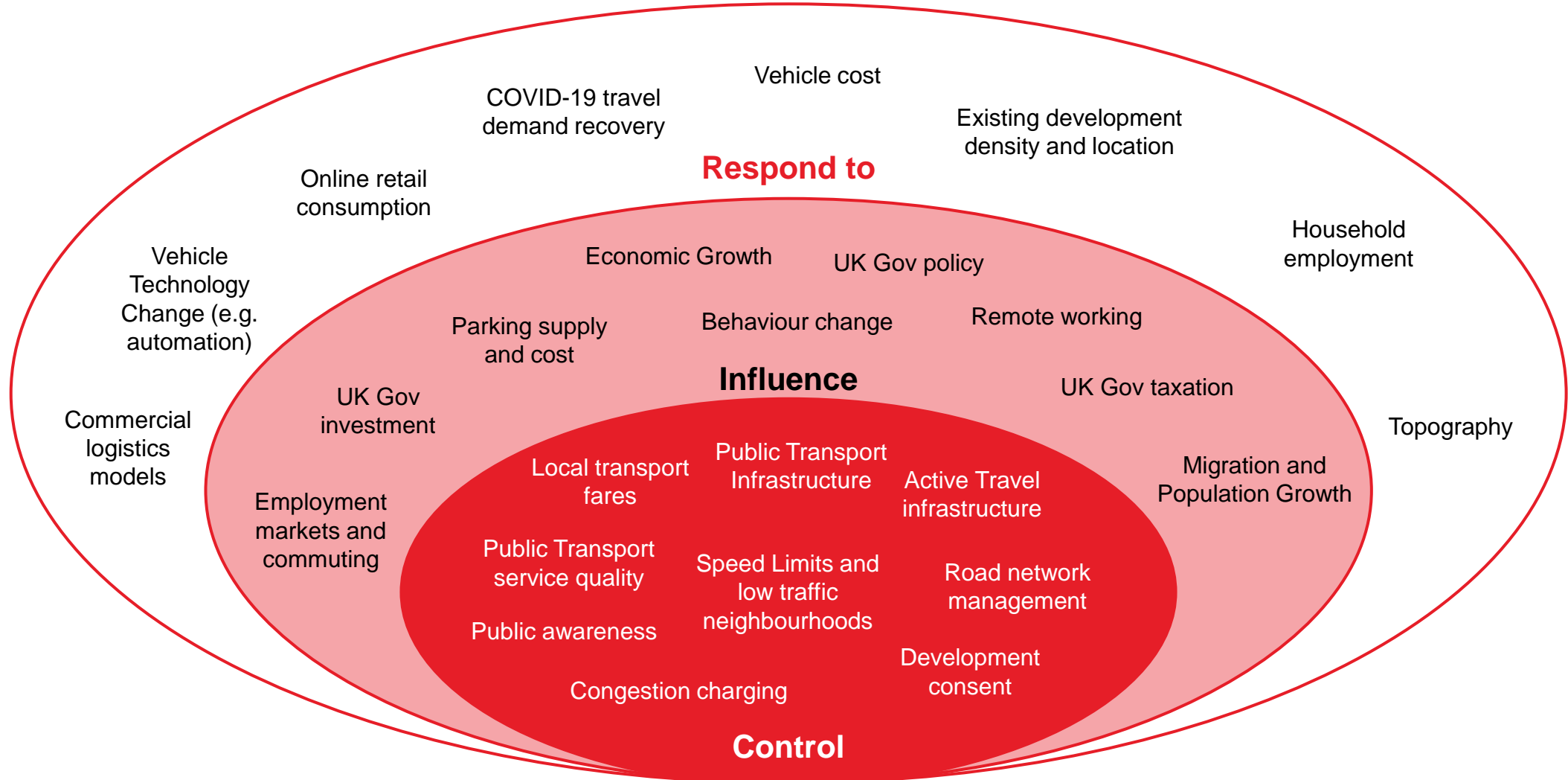
Considered
Casey

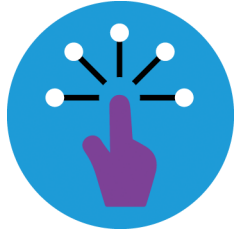
Anxious
Abi



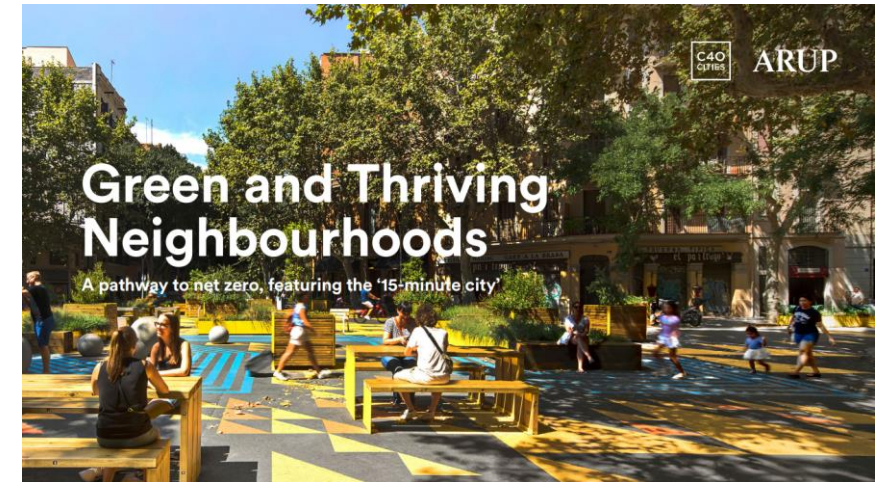
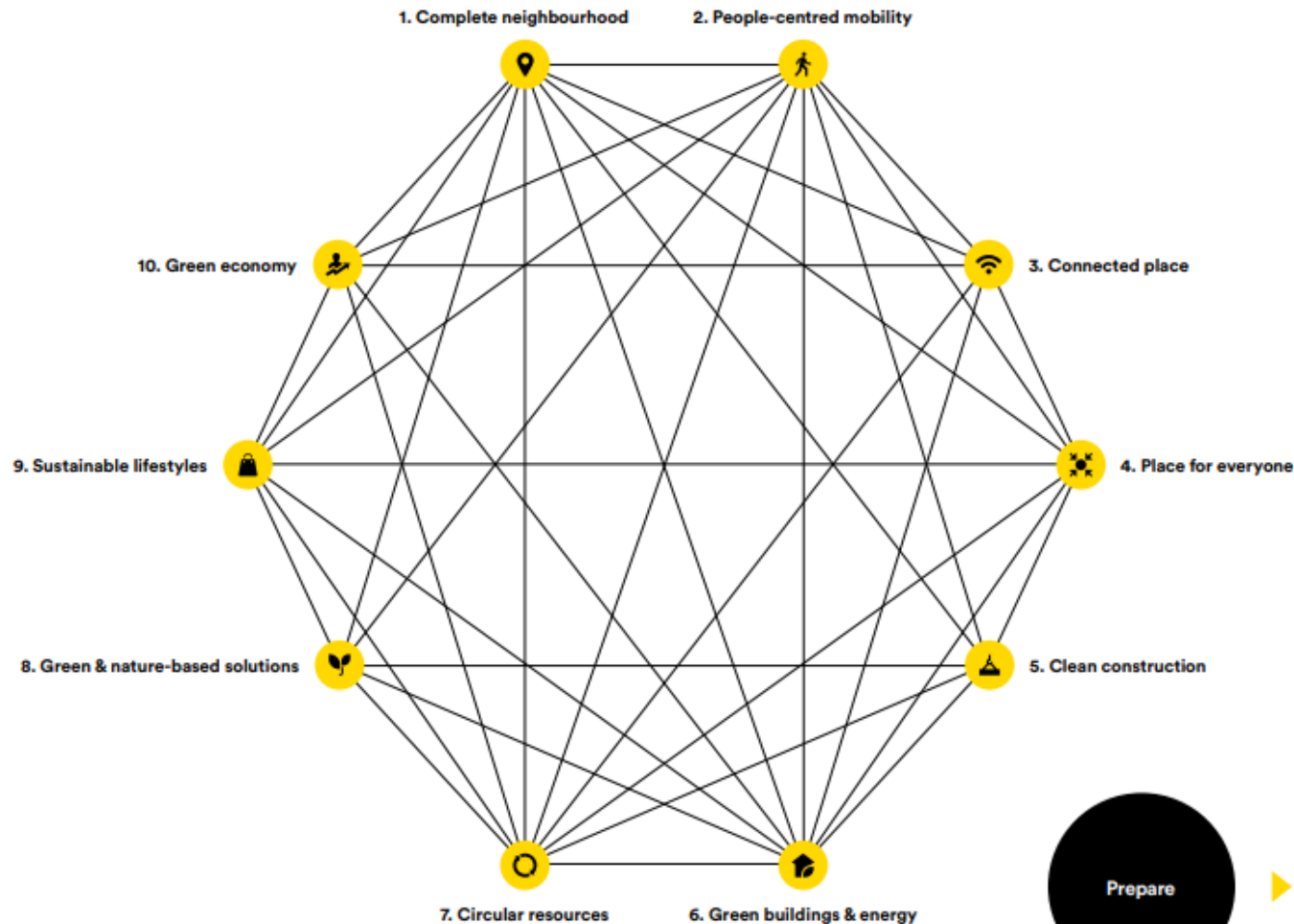
Delivering change requires a holistic approach – improving sustainable options, making driving less appealing, and considering factors beyond transport

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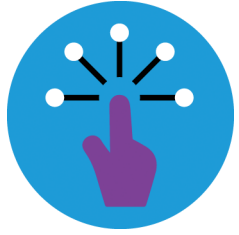


In particular, this means integrating transport and land use planning



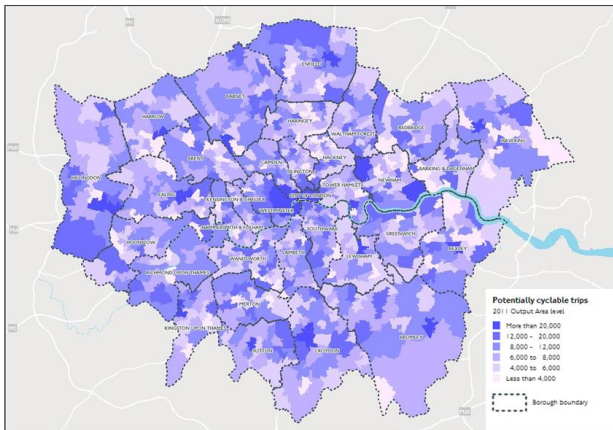
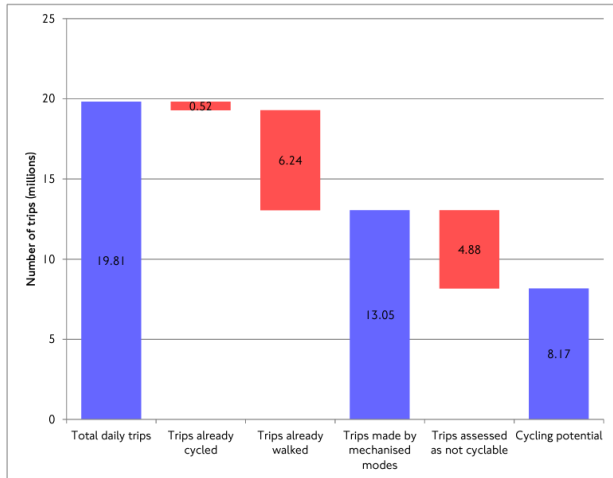
<https://www.arup.com/perspectives/publications/research/section/green-and-thriving-neighbourhoods>





Change can happen when you take a holistic approach

1. Potential for cycling

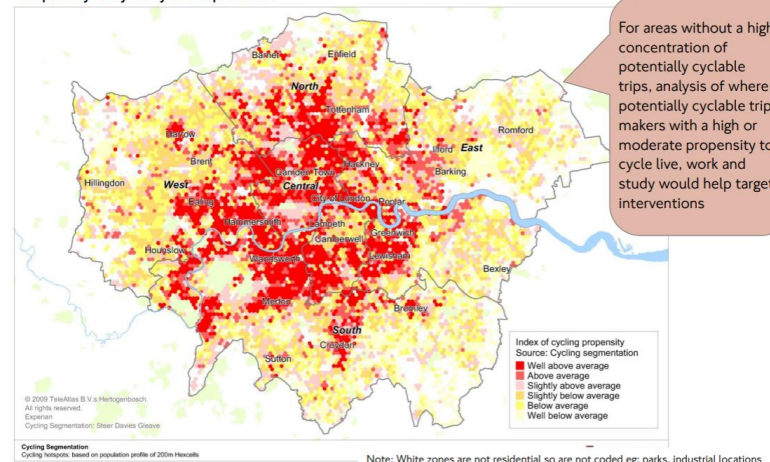


2. Who might cycle

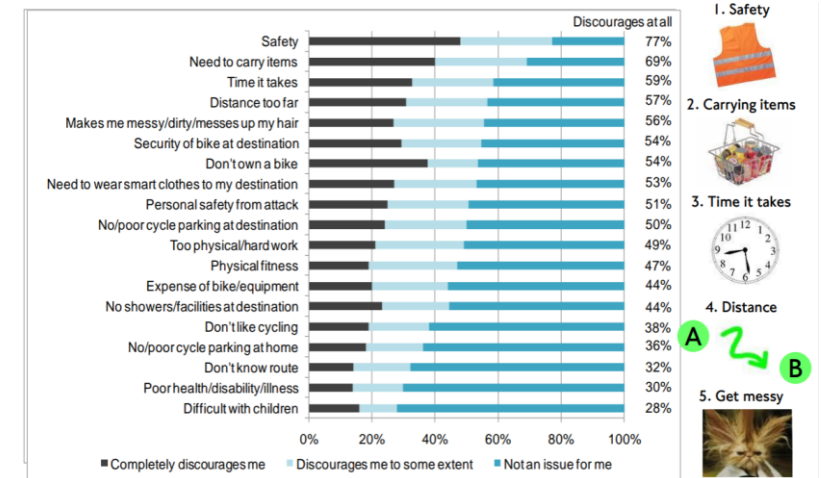
Segment	Description	% Londoners	Propensity to cycle
Urban living	Young, well educated, reasonably well-off and usually live in town/city centre. Many choose to live without a car.	23%	140
Young couples and families	Young, with relatively low car ownership and young children. Often tight finances, ethnic background may present a barrier to cycling.	15%	113
High earning professional	Well educated, affluent, often working in multinationals. Tend to use personal rather than public transport.	11%	106
Suburban lifestyle	Average income, heavily reliant on car and living in suburbia. Cycling for leisure is as likely as cycling for purpose.	17%	102
Hard pressed families	Difficult family finances, and often living in inner city flats and tower blocks. Ethnic background may present a barrier to cycling.	21%	85
Manual trades	Mainly white with high car ownership, this segment is unlikely to cycle with generally negative attitudes towards cycling.	5%	42
Comfortable maturity	Older and retired people, reasonably well off, living in suburban areas - some potential for off-road leisure cycling.	8%	30



Propensity to cycle by home postcode



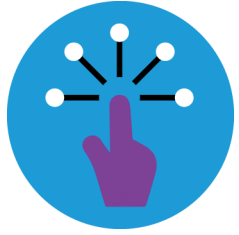
3. Effective interventions



Cycle Route Choice Survey: qualitative and quantitative survey conducted in 2012 with London cyclists. 2,307 respondents to quantitative Stated Preference/Intention survey, 25% response rate.

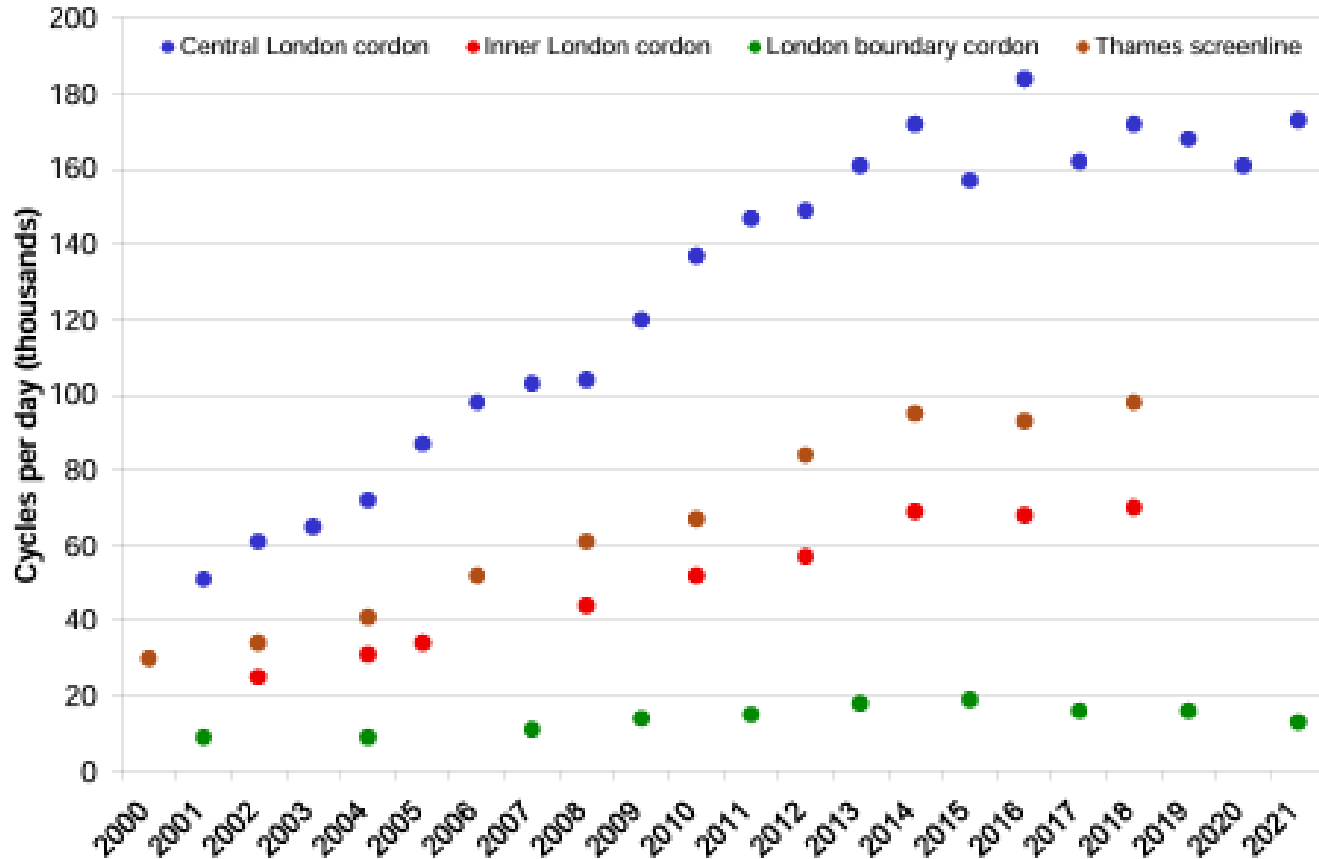
Key Findings

- When choosing a route, the key considerations for cyclists are the safety of that route and being able to avoid traffic and difficult junctions
- Cyclists were prepared to travel further to cycle in cycle lanes, bus lanes, on residential roads and in particular would travel 3 times further to cycle off-road
- More confident cyclists and those who cycle most frequently tend to opt for the most direct route
- But cyclists will make significant detours to avoid junctions perceived to be dangerous



It worked! We have seen that investment in cycling has led to more cycle travel

Figure 4.1 Cycle flows across strategic cordons, 2000-2021.

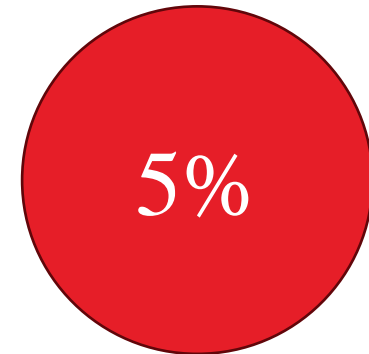


Source: TfL traffic data.

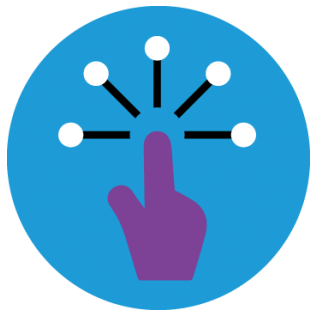
Note: The 2020 counts at the inner cordon and Thames screenline were cancelled due to the pandemic restrictions.



% of journeys made in London



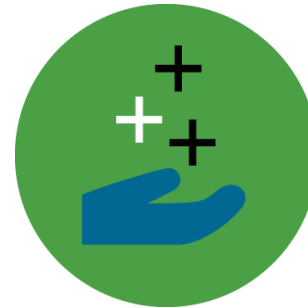
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1. Credible
Vision / Plan



2. Consensus



3. Finance



4. Data



2. Consensus



What's working well?

- Updated WelTAG provides clear guidance around new projects - embedding strategic goals as a golden thread throughout decision making process
- Roadmap for establishing local consensus for delivery within Wales through CJsCs

More to be done?

- Consensus amongst UK / Welsh Gov across policy levers
- Public acceptance and engagement in decision-making processes



A citizens' assembly, representative of the wider population's views, allows time for debate and forming of recommendations

Vision statement

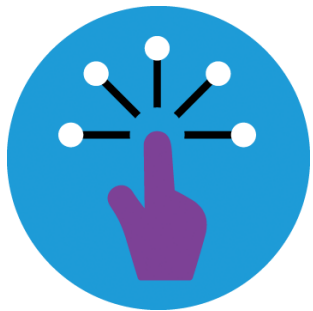
Assembly members would like to see a future where:

People in Southampton use public transport and active travel (walking, cycling etc) as their main ways to get around.

- The council provides or works with others to provide much better public transport and active travel.
- There are many fewer cars on the road. These cars are electric – and the council provides the charging infrastructure for these vehicles but this costs the council less [than in the other vision statement options] because it needs to support many fewer cars.



Key ingredients of a successful modal transition...



1. Credible
Vision / Plan



2. Consensus



3. Finance



4. Data



3. Funding and Finance



What's working well?

- Understanding of funding requirements to meet modal share targets
- 'Rewiring the system' – Reprioritisation of transport infrastructure funding. Wales is an exemplar globally.

More to be done?

- Consideration of innovation around funding and finance e.g. Travel Demand Management, private finance etc
- Equitable funding with rest of UK regions e.g. rail
- Low hanging fruit – low-cost behaviour change interventions



‘Rewiring the system’ – Reprioritisation of transport infrastructure funding has made Wales a global exemplar



Llwybr Newydd Wales Transport Strategy	Net Zero Wales
Roads Review	20mph Default Speed Limit
Bus Reform Programme	EV Charging Strategy
Active Travel Investment	Metro Networks



How do we ensure that progress isn't halted by short term political and economic uncertainty?

Department for Transport

The Plan for Drivers

October 2023

Forbes

FORBES > INNOVATION > SUSTAINABILITY

Lost Fuel Duty Could Have Paid For Two HS2 Networks Or A Better NHS

Carlton Reid Senior Contributor @
I have been writing about transport for 30 years.

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U.K. Chancellor Jeremy Hunt leaves Downing Street with the despatch box to present his spring budget ... [+] GETTY IMAGES

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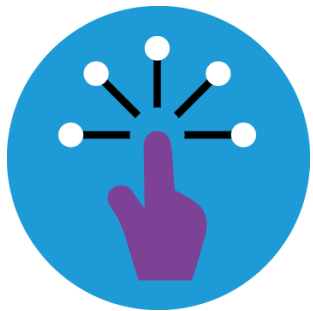
UK Parliament > Business > Committees > Public Accounts Committee > News Article

Active travel: Government programme off-track as funding reductions hold back progress

3 November 2023

- Progress disappointingly slow on increasing rates of active travel by 2025
- £2.3bn spent on active travel by DfT for unclear impact and benefit

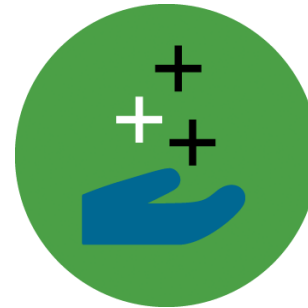
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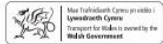
3. Finance



4. Data



4. Data and Monitoring



<add1>
<add2>
<add3>
<add4>
<add5>
<Postcode>

Your reference:
P18781 <HHSerial>/<CKL>

Dear Resident,

Your household has been chosen to take part in an online survey about travel and transport in Wales – we hope you can spare the time to help us with this.

This survey is administered by the National Centre for Social Research (NatCen) on behalf of Transport for Wales. This survey will inform transport policy in Wales, so it's important that as many people participate as possible. By taking part, you can make sure that policymakers better understand how people like you experience and use transport in Wales.

Taking part is voluntary. You will be asked questions about yourself, how you choose to travel, and the journeys you have recently decided to make.

How to take part

- 1 Go to the survey on your mobile or computer: mysurvey.natcen.ac.uk/GGS
- 2 Enter your unique access code: <Acc1>
- 3 Complete the survey and receive a £<VouchType> voucher as a thank you

<QRInstr1>

<QRInstr2>

<QRcode>

How long will it take?

The survey will take about 50 minutes of your time. You will then receive a £<VouchType> voucher.

Who should take part?

We would like one person aged 16 or over in your household to take part. If there is more than one person aged 16 or over, our survey will select a random person to take part.

When should I complete it by?

You have until <Date> to take part online. By taking part you can make sure that policymakers better understand how you view and use transport, and consider the opinions and experiences of people like you.

Thank you for your support,

Geoff Ogden
Chief Transport Planning
and Development Officer
Transport for Wales

What's working well?

- Regional models developed by Transport for Wales provide evidence base for decision making
- Action across various policies: Bus reform, default speed limit, active travel infrastructure etc

More to be done?

- Better granularity of targets and understanding across user groups / geographies – informed by the Wales National Travel Survey
- Transport evidence base: understanding of what works and what doesn't – requires a better understanding of places, travel patterns, population and preferences/barriers to change



Blanket national mode share target quickly becomes ambiguous – what do we need to do to move towards implementation?

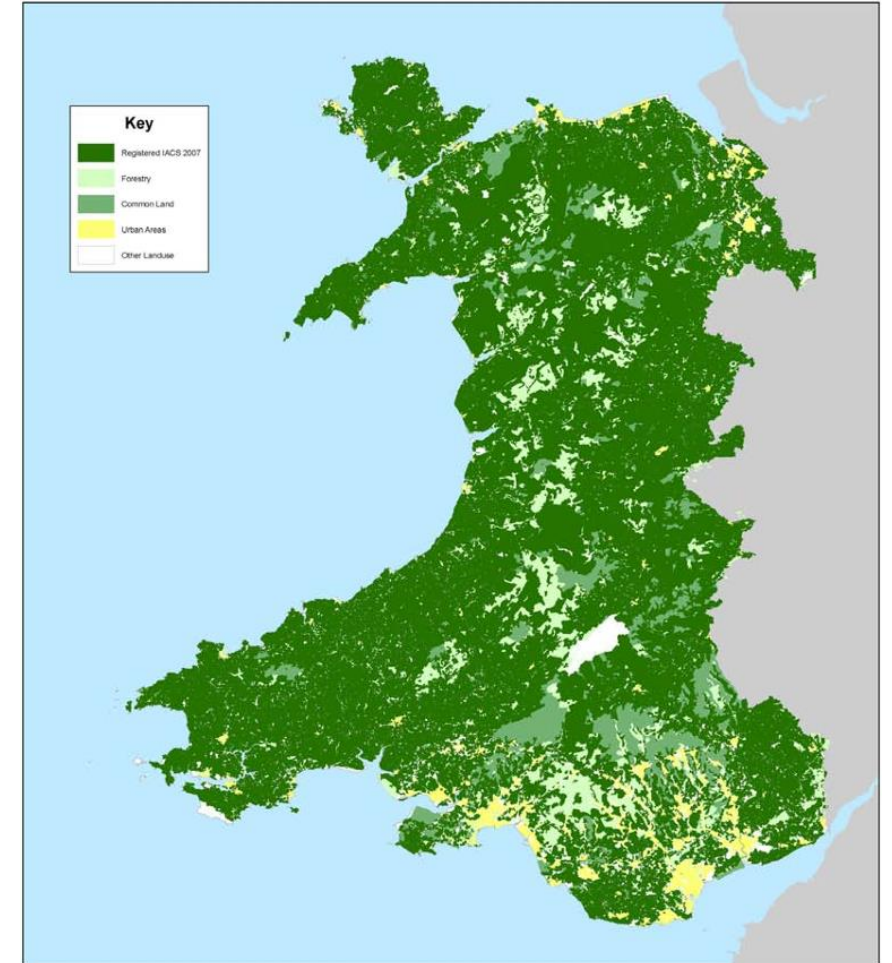
- Is the national baseline representative of my authority / region?
- Should I approve this development that is unlikely to meet the national target?
- What are the implications for not meeting / exceeding the national target?
- How are we doing in terms of progress?
- We've achieved the 45% target already, should I put my feet up?





Whilst we have a national target, mode shift is unlikely to happen uniformly across Wales

- Urban vs rural
- Aiming to meet targets uniformly may risk spreading resources too thinly
- Where is new development being planned?
- Implications for CJs in the development of Regional Transport Plans



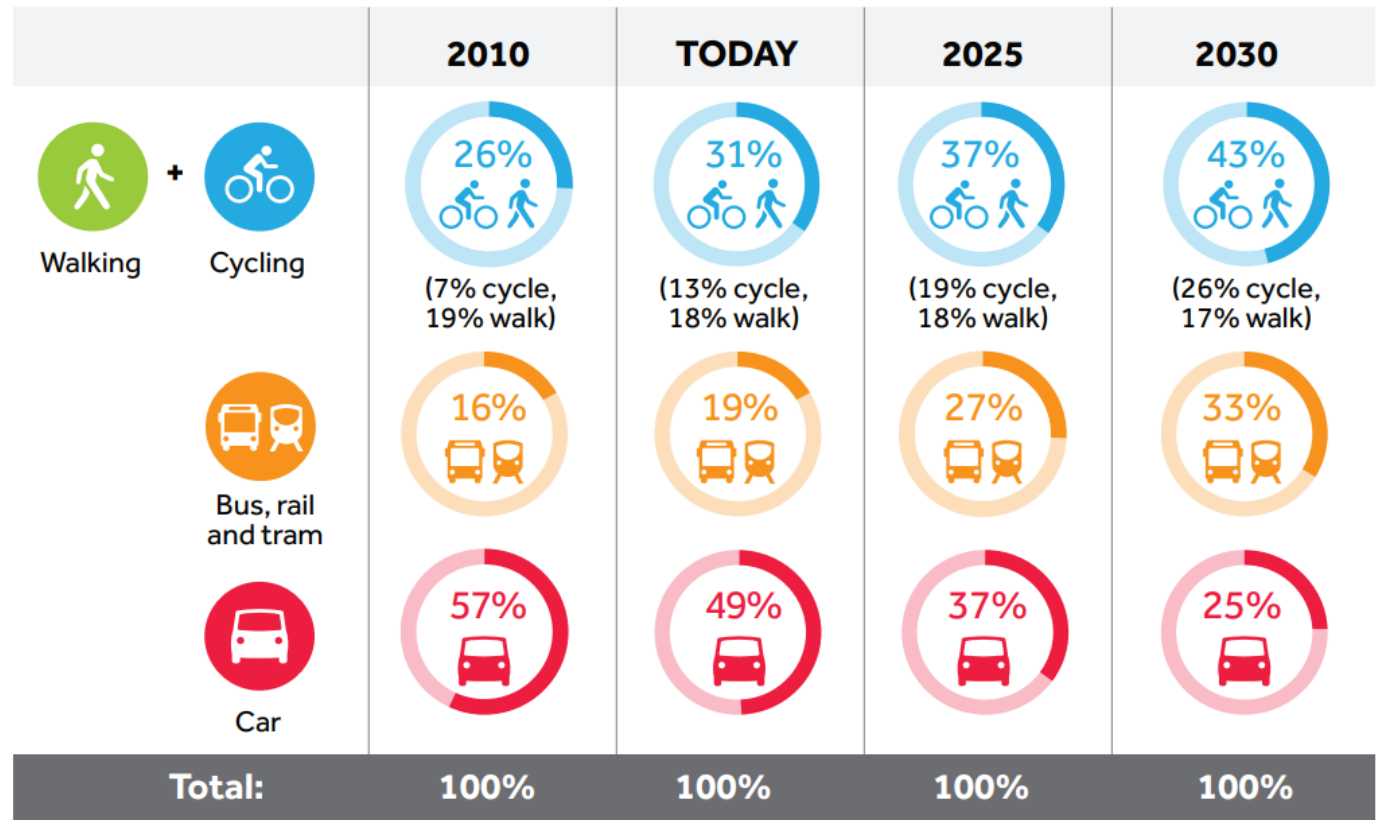
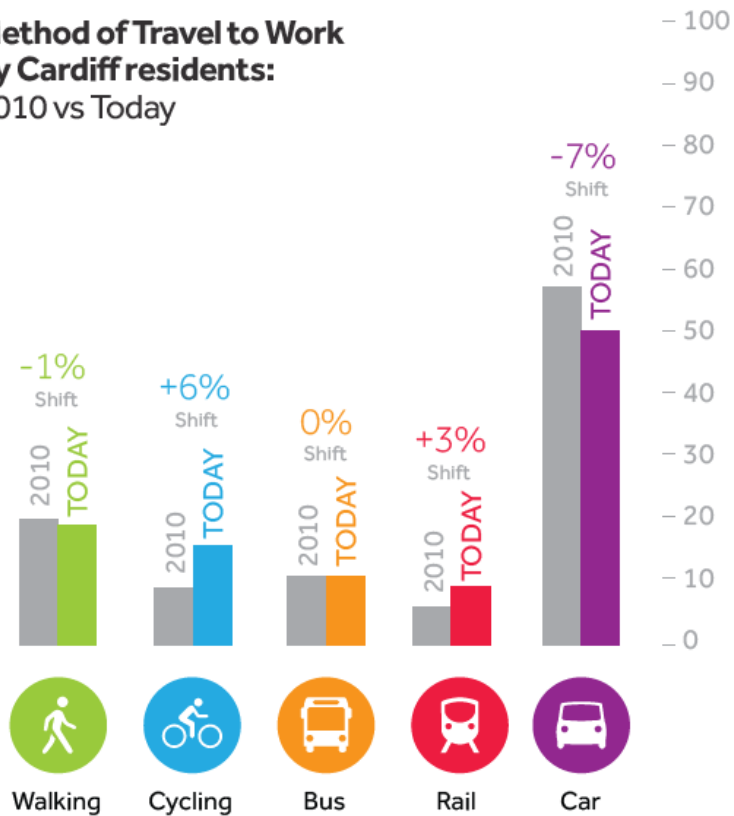


Cardiff Council have already acknowledged the potential for a higher mode share by walking, cycling and public transport

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Source: Cardiff Council White Paper: Transport Vision to 2030 ([link](#))

Method of Travel to Work by Cardiff residents: 2010 vs Today





Targets are ambitious, but achievable when viewed against international comparators

Source: Modal share targets for Wales, Transport for Quality of Life, January 2021 ([link](#))

	Wales in 2030	Wales in 2040	Germany in 2017	Switzerland in 2015	Zurich Canton in 2015*
Bottom-up analysis	39%	47%	43%	50%	71%

Sources:

Swiss Federal Government 2019 Der Modalsplit des Personenverkehrs in der Schweiz p.9



German Federal Government 2019 Mobility in Germany Short Report Transport Volume-Structure-Trends p.13

* Swiss Federal Government Federal Statistical Office 2015 Mobility and Traffic Microcensus. Note that this source may use trip stages not main mode of journey and therefore may not be directly comparable.



A trebling in mode share is possible without large scale switching of car users who never use public transport

Source: Welsh Government Bus Bill Supporting Analysis

Frequency of Public Transport Trip	Existing	Possible Future Scenario
Daily	2%	16%
Twice a week	14%	4%
Twice a month	4%	7%
Less than monthly	7%	32%
Never	73%	41%
Trips per head per annum	37 	105 

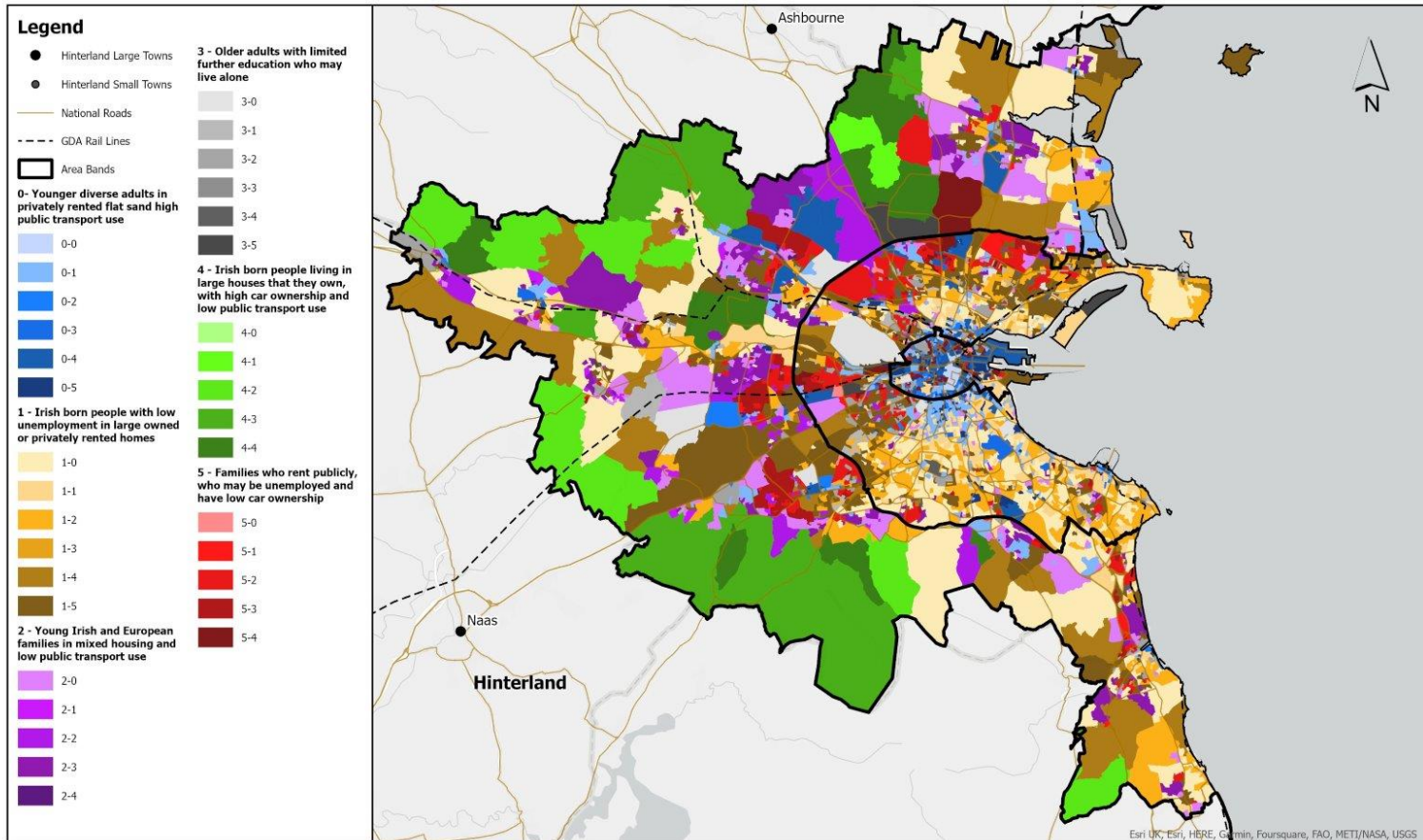
For example:

- A person who already uses public transport twice a month increases usage to twice a week
- Some (less than half) of those who never use public transport start to use it infrequently (less than monthly)



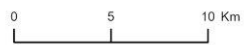
We have more tools than ever before to help us plan

Geodemographic Cluster Model (Census 2016)



Cluster
0 - Younger diverse adults in privately rented flats and high public transport use
1 - Irish born people with low unemployment in large owned or privately rented homes
2 - Young Irish and European families in mixed housing and low public transport use
3 - Older adults with limited further education who may live alone
4 - Irish born people living in large houses that they own, with high car ownership and low public transport use
5 - Families who rent publicly, who may be unemployed and have low car ownership.

Notes
 Dublin Metropolitan Area
 Data Source: Central Statistics Office (CSO), Ireland, Census 2016
 Prepared by Arup Geospatial



Date	Scale	Drawn	Checked	Approved
30/11/2023	1:270,000	KF/KC	MO	LM



Esri UK, Esri, HERE, Garmin, Foursquare, FAO, METI/NASA, USGS

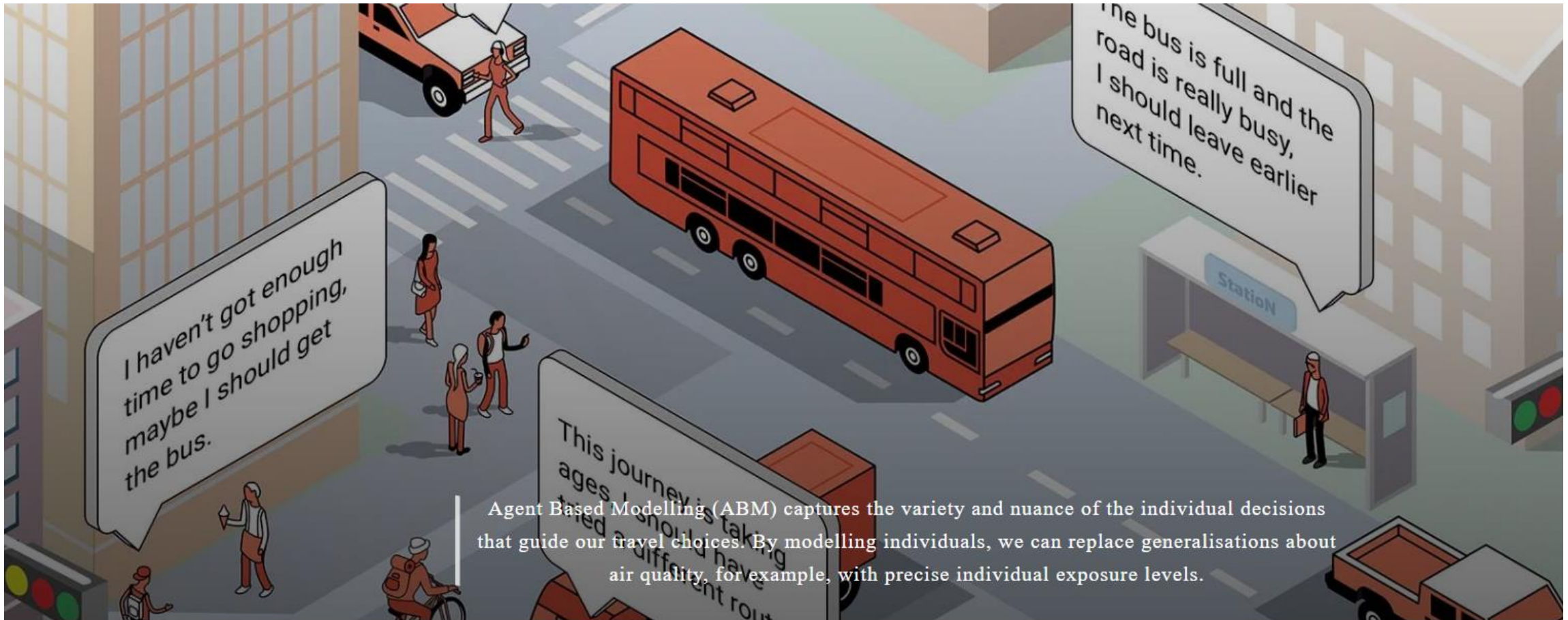


Our Umove tool is a bespoke toolkit that automates the generation of urban networks with custom walk and cycle quality factors



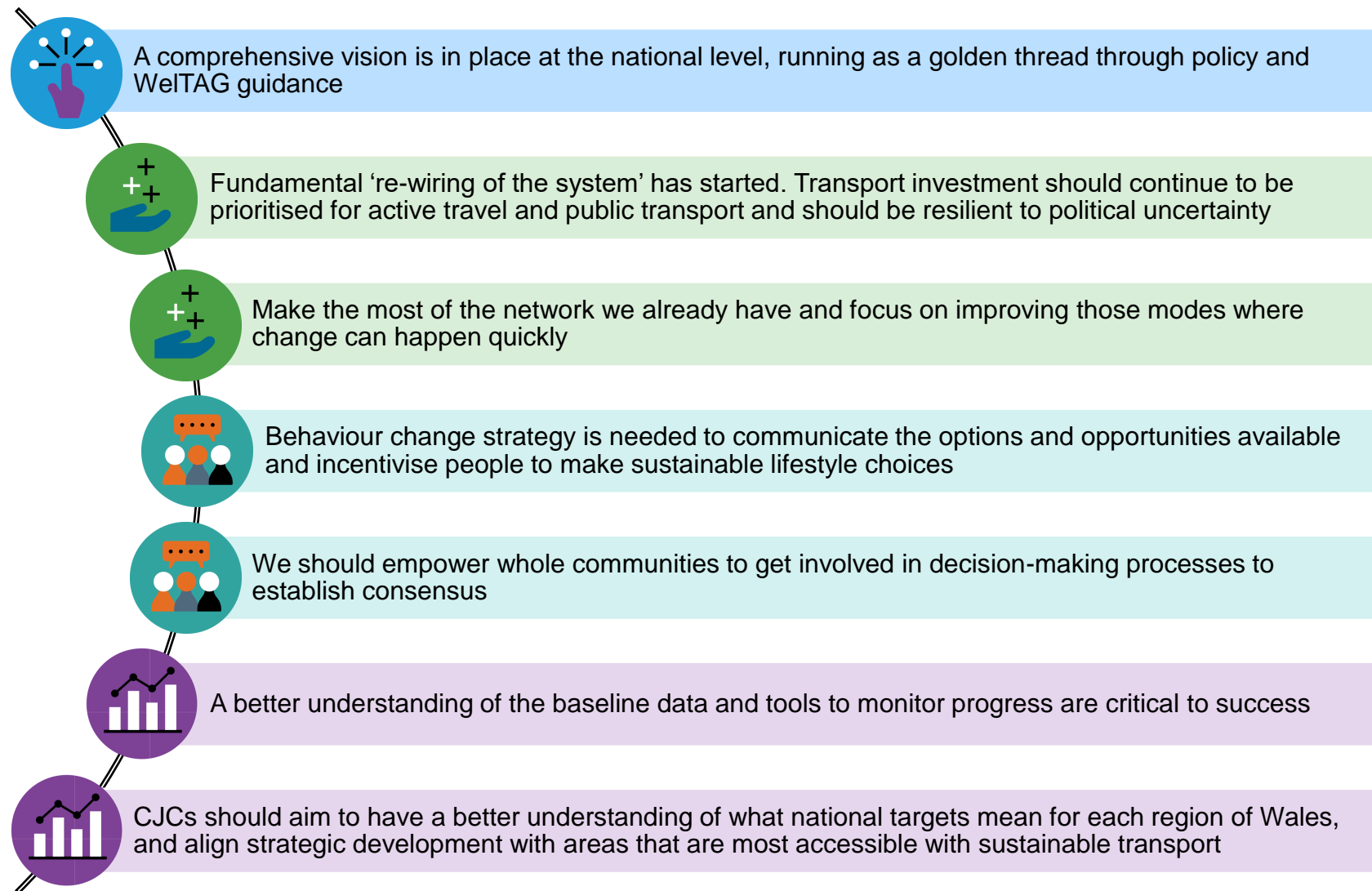


Understanding individuals' evolving priorities can support better decision making – ABMs help us to do this at scale



Conclusions

45% of journeys to be made by public transport, walking and cycling by 2040



Thank you

Diolch



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