



Russell George AM
Chair, Economy, Infrastructure & Skills Committee

SeneddEIS@assembly.wales

24 August 2020

Dear Russell,

Thank you for the opportunity to attend your Committee session on 11 May 2020. Please find below my response to your letter of 22 May regarding areas that were not reached during the session due to time constraints.

What assessment has been made by the Welsh Government of the long-term impact of the virus on transport demand and travel patterns?

The Department for Transport have commissioned '*All Change?*' - a longitudinal survey to explore the impact of COVID 19 on attitudes and behaviours to transport use. The objective of the survey was to understand travel behaviour during the lockdown period as the basis for tracking changes in behaviour among the same group of people over time and as lockdown restrictions are eased. The majority of findings provided by the summary report are at the UK level. However the report notes that travel behaviour has been similar across the different parts of the UK during the lockdown period.

Transport use during lockdown (23rd March – 10th May)

- Lockdown changed behaviour; resulting in less travel, less car and public transport use, and more active travel.
- Private modes of transport and active travel were the most common ways of getting around during lockdown:
 - 63% drove a car during lockdown, 65% walked or wheeled all the way to a destination and 21% cycled. By contrast, high proportions of people – 82% and 88% respectively – did not get on a bus or a train.
 - Bus use was higher than train use; but only 6% made journeys by bus once a week or more frequently with even fewer, 2%, doing so by train.
- While travel behaviour has tended to be similar across the UK, people living in Wales and Northern Ireland (NI) drove significantly more frequently; over half (52%) of those in Wales and two-thirds (66%) in NI made a journey by car as a driver once a week or more often compared to 46% in England and 47% in Scotland.

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Rydym yn croesawu derbyn gohebiaeth yn Gymraeg. Byddwn yn ateb gohebiaeth a dderbynnir yn Gymraeg yn Gymraeg ac ni fydd gohebu yn Gymraeg yn arwain at oedi.

We welcome receiving correspondence in Welsh. Any correspondence received in Welsh will be answered in Welsh and corresponding in Welsh will not lead to a delay in responding.

- Reductions in mode use were most marked for travelling by car (either as driver or passenger), bus and train. Those living in Wales and NI were also particularly likely to say they reduced their driving by a little or a lot during lockdown – 55% and 58% respectively, compared to 47% in Scotland and 48% in England.
- Lockdown created changes in shopping, recreation, commuting and travel plans with people reporting that they worked at home, took fewer shopping trips and shopped closer to home than they did before.

Indications and expectations about future transport use (next four weeks)

At the time of survey fieldwork, most expected to maintain lockdown travel-related behaviours:

- Commuting and working at home are likely to be important factors and most people expect to continue working from home and travel for work as much as they did during lockdown.
- The use of active travel and private transport modes are expected to continue and the most commonly anticipated ways of travelling in the next four weeks are walking/ wheeling all the way to a destination, followed by driving by car.
- Expected use of private modes contrasts sharply with public transport modes;
 - 8% think they are certain or very likely to travel by bus in the next four weeks and 5% by train.
 - A fifth (19%), of those in work think it is 'already' or will be the 'right time' to commute by public transport in the next month, 48% think the same of doing so by car.
 - 70%, say they would be not very or not at all comfortable traveling by bus, train, tram and underground rail/metro services.

Actions to encourage use of public transport:

- Passengers and staff following social distancing rules while travelling (at bus stops, on platforms, and in stations) are most commonly chosen from a list of thirteen actions as most likely to encourage use of public transport – by 37% of people overall and 43% among those who travelled by public transport once a week or more often before lockdown.
- Weekly or more frequent users of public transport also prioritise the wearing of face masks/face coverings (33%) and better/deeper cleaning of carriages, buses etc. (31%).
- 11% (25% of the wider public) stated that none of the measures would offer encouragement.

The Welsh Government and Transport for Wales are currently working with colleagues in the Department for Transport to identify the range of possible scenarios for future travel demand. These range from a gradual return towards previous travel patterns, albeit with a higher proportion of people working from home, to more extreme scenarios of greatly increased private car use or a collapse in demand for travel. There is no consensus just yet as to what the long-term impact will be.

As part of work being undertaken for the South East Wales Transport Commission, the Welsh Government's South East Wales Transport Model is being used to assess the impact of increased working from home on travel demand along different road / rail corridors. Based on wider economic analyses that have been undertaken, overall travel demand for this assessment is assumed to drop by around 20% although there are some slight variations in areas based on the dominant employment sectors. Outputs from this will be reviewed over the coming weeks.

Transport for Wales (TfW) is working with businesses to understand their expectations and plans for returning staff to work and working from home. Forecasting assumptions will be adapted based on this work.

With the new regional transport models for North Wales / South West & Mid Wales becoming available for use during the summer, the intention is to run post-Covid 19 scenarios over the summer based on improved knowledge of the most likely trends.

What long-term changes to transport budget priorities and policy as a whole might be required?

Discussions are underway with Local Authorities about how we can use COVID-19 emergency to achieve step change in bus and public transport provision.

Future COVID-19 funding for the bus industry is to be provided via the Bus Emergency Scheme (BES). The scheme will be introduced in phases and will deliver a more integrated and flexible network to match supply to demand, flex services, and allocate any additional funding. This emergency funding, currently maintained at historic levels, will be for an initial period of three months and will provide financial assistance to the bus industry to keep buses moving across Wales.

BES will provide an operating subsidy in lieu of lost revenue due to COVID-19 and significantly reduced vehicle passenger carrying capacity due to social distancing. As well as addressing emergency short term needs, the agreement underpinning the BES is intended to signal the beginning of a lasting partnership between operators and public bodies to enable a reshaping of Wales' bus network, supporting the management and interaction across transport modes including smart ticketing, unified routeing, and integrated timetabling.

Operators will work with local authorities and TfW to determine the initial routes and frequencies that operators should deliver within the available funding. In agreeing these bus service levels, it will be necessary to consider the following:

- how best to serve key workers (including but not limited to NHS staff);
- how best to support economic activity as the economy restarts;
- the capacity of the Operators' buses considering reduced service patterns and compliance with social distancing guidelines; and
- accommodating any staff shortages Operators are facing.

Going forward, the Welsh Government, supported by TfW, will design a new funding scheme in collaboration with local authorities and bus operators which will include a fair and consistent approach to fares, building patronage, and agreement to the principles of an Economic Contract and a Social Charter. This approach will enable us to work in partnership to improve services for passengers, including cleanliness, reliability and safety and security, which will all be critical during the recovery period while we work together to secure an efficient, sustainable, and robust bus network for the future.

What effect will the pandemic have on the viability and delivery of major infrastructure investment? Particularly delivery the valleys electrification, the three metro programmes more generally and the highways schemes?

We have successfully completed the transfer of rail assets from Network Rail, it's taken many years of preparatory work and complex legal negotiations to get to this point, and we'd like to thank all partners involved for their hard work and collaboration.

South Wales Metro works are well underway. At the start of the year, TfW opened the Metro Infrastructure Hub at Treforest, as well as starting construction work on our Metro Depot and Control Centre at Taff's Well. It has been undertaking surveying and design work across the valley railway lines, and I am pleased that work on the ground is due to start over the Summer.

It is inevitable that the programme for this work will be impacted by recent developments in relation to coronavirus (COVID-19) due to the need to maintain social distancing, and potential impact on supply chain production and availability. However we'd like to reassure you that they will be following Welsh and UK Government guidance to ensure that the Metro Transformation can be delivered safely.

In respect of the North Wales Metro TfW have been progressing with a number of initiatives including improvement to Shotton Station and a new rail station at Deeside. Work is also ongoing with reviewing the bus network in the region and there is now a governance structure in place to manage the programme of initiatives to develop an integrated transport system in North Wales.

TfW are also continuing to progress with stakeholders in West and Mid Wales the development of a strategic transport model. This will inform investment decisions in Mid Wales and the development of the South West Metro Vision and Delivery Plan. We intend to update on the progress of this work before the end of the year.

Highway schemes

New Regulations have been made, the Health Protection (Coronavirus Restrictions) (Amendment) (Wales) Regulations 2020 (made on 3 April; came into force 12.01am Tuesday 7 April) which introduced a requirement for 2 metres social distancing in the workplace.

The workplace includes open situations such as construction sites and roadworks. The duty to distance is subject to 'reasonable measures' in order to comply, and this is set out in the Guidance to the regulations published by the Welsh Government on 7 April. In addition other professional, industry and trade bodies, including the Construction Leadership Council for the construction industry, have published useful guidance about complying with the new regulations and best practice.

Works on highway schemes are therefore continuing in line with these current guidelines. A number of additional measures and controls have been introduced to assist in complying with the guidelines. Some of these measures include home working wherever possible, additional site vehicles, additional cleaning staff, revised welfare arrangements and remote briefings in smaller groups or individually or electronically.

The Welsh Government's Framework for Recovery from the pandemic talks about seizing on the changes which can have a positive impact long into the future. What might this look like in transport?

During the lockdown period there have been large increases in walking and cycling among individuals and families, both for exercise and to make necessary journeys. We now need to act to maintain these healthy and climate friendly travel behaviours and prevent a return to heavily car-dependent travel choices.

£15.4m funding has been allocated to local authorities to introduce measures to improve the safety and conditions for sustainable and active travel modes in their area in response to

the Covid-19 crisis and to achieve sustained changes in travel behaviour in the future. The funding will improve conditions for pedestrians and cyclists in both urban and rural areas.

We received a total of 209 proposals for measures from all local authorities in response to the invitation for expressions of interest. This clearly demonstrates the need, and willingness of local authorities, to introduce measures to protect public health and safety and to enable people to choose the healthiest and most sustainable transport modes for shorter journeys now and in the future. In collaboration with the Deputy Minister for Housing and Local Government, it is our intention to follow up this first tranche and make further funding available where it is needed. We will work proactively with local authorities to develop further, ambitious interventions as part of the Transforming Towns programme.

I trust that you will find this information useful.

Yours sincerely,

A handwritten signature in black ink, appearing to read 'Ken', with a long, sweeping horizontal stroke above the letters.

Ken Skates AC/AM

Gweinidog yr Economi a Thrafnidiaeth
Minister for Economy and Transport