



Cyd-Bwyllgor Corfforedig  
Gogledd Cymru  
North Wales  
Corporate Joint Committee



# North Wales Regional Transport Plan

## Case for Change

(Draft)





## EXECUTIVE SUMMARY

The Regional Transport Plan (RTP) for North Wales is being developed by the North Wales Corporate Joint Committee (CJC). This Case for Change sets out the aims and objectives of the RTP and identifies the key issues, challenges and opportunities the plan should consider in order to guide the development of an integrated transport network for North Wales.

It considers the evidence and recommendations of the North Wales Transport Commission whilst also considering how North Wales can support the delivery of Llwybr Newydd - the Wales Transport Strategy, and local policies and strategies.

### Urban and Rural

The varied nature of settlements and communities in North Wales means that the RTP needs to consider the needs of residents in urban centres and rural communities. It is vital that the RTP recognises that, whilst modal shift may, and should, be facilitated through enhanced public transport and active travel in and between our towns and cities, reducing car use in rural communities is more challenging.

It is vital that the RTP proposes improvements to active travel, public transport, and other sustainable mobility options in the rural areas of North Wales. This will provide more options for sustainable travel in communities that are often currently poorly served. The RTP should consider integrated, frequent and high-quality rural transport services, and include enhanced walking and cycling infrastructure connecting rural communities. However, it is vital that the RTP acknowledges private car use is considered crucial for many rural residents should consider how to facilitate the switch to Electric Vehicles for those in rural areas who are more dependent on private car use.


### Supporting Economic Development

The RTP must include plans for supporting the growth of the economy across North Wales in urban and rural areas. The transport system should be planned in a way that provides people with access to good quality jobs, regardless of where they live.

The RTP should support the continued economic development of North Wales by considering enhancing access to employment sites in the region for both current and future employees and, where applicable, customers. The requirements of the transport network vary across North Wales. In rural areas, employment may be seasonal and remote. In areas where tourism is significant, there is increased demand on the transport network in summer season. Where manufacturing and storage are key sectors, the considerations are the volume of trips to large employment sites, shift patterns, and the requirement for higher levels of HGV movements.

The Anglesey Freeport and the Flintshire and Wrexham Investment Zone create significant opportunities for North Wales, and it is vital that our transport network is suitable for maximising these opportunities. The RTP should seek to support the success of Holyhead and Mostyn ports and facilitate their future growth but set out a plan for ensuring the impacts of good movements is minimised. It should consider the role of rail freight and also how to encourage hauliers to switch to cleaner fuels. The RTP should also identify measures for reducing the environmental impact of local deliveries.





The importance of cross-border commuting means that the RTP must consider supporting further partnership working with authorities in north-west England and set out proposals for improvements to public transport and active travel that facilitate sustainable cross-border commuting.

## The Visitor Economy

The visitor economy is hugely important for many areas of North Wales so the RTP must include plans for supporting the growth of the visitor economy in North Wales, ensuring that we are planning a transport system that provides sustainable access to the many attractors across the region.

The RTP should consider facilitating reducing car use and minimising the impact of visitor car parking in Eryri. It should also acknowledge the proposed changes to the Clwydian Range through Welsh Government's manifesto commitment for a second National Park in North Wales.

## Active Travel

The RTP should outline proposals for further expansion and improvement of the active travel network in North Wales to encourage an increase in the number of people choosing to walk or cycle. This should focus on connections to key attractors such as employment and education sites, healthcare, railway stations and tourist attractions.

## Bus Services

The RTP should consider proposals for further review and improvement of bus services and measures to encourage an increase in bus use. Bus services should focus on improving access to services from communities. They should connect to key attractors such as employment and education sites, healthcare, railway stations and tourist attractions. Bus has an even more important role to play in the many towns and villages in North Wales that are not served by rail services.

## Rail


Whilst rail is not directly influenced locally, it is important that the RTP acknowledges measures to enhance the rail offer in North Wales. To enhance services, the key priorities for improvements are the Borderlands Line, increasing capacity at Chester Station, and increased service levels on the North Wales Main Line. Other important rail enhancements include the Chester to Wrexham, Conwy Valley Line, and Cambrian Coastline.

The RTP should consider the importance of connections to key centres such as London, Cardiff, Manchester (including the airport), Liverpool, Crewe, and Warrington (for Northern Powerhouse Rail). The Plan should consider sustainable travel links to interchange facilities at rail stations.

Through the RTP we should seek opportunities to increase rail freight in North Wales.

## Modal Shift

The RTP guidance requires that the plan has a focus on modal shift (reducing car use through the increase in the use of more sustainable modes). It is vital that we focus on this in urban areas through the provision of high-quality sustainable alternatives. In many rural areas we need to acknowledge



that this shift is more challenging and recognise that a shift to zero emission vehicles is a more effective way of decarbonising travel, whilst seeking opportunities to enhance active travel and public transport provision.

## The Role of the Private Car

Whilst seeking opportunities to encourage more people to travel by active travel and public transport, the RTP should acknowledge the importance of the road network to free movement around North Wales for those with access to a car, and seek to improve the resilience of this network. This is particularly important for crossings of the Menai, where incidents on the road network can isolate communities.

The RTP needs to consider options for improving the reliability and resilience of the Menai crossing. This should include improving the resilience of the road bridges and enhanced sustainable transport options.

## Infrastructure Management and Maintenance

A network of well-maintained transport infrastructure is key to supporting travel around North Wales, both for private car journeys but also for bus services and active travel journeys. All bus journeys and a large proportion of active travel trips take place on the highway. Highway defects such as potholes can be a more significant hazard for cyclists than other highway users.

Therefore, the RTP needs to acknowledge the importance of maintaining and improving existing infrastructure.

## Vision Statement

The Vision for the North Wales RTP is:

**North Wales will have a safe, sustainable, affordable, resilient, and effective integrated transport network that supports economic growth, prosperity and well-being.**

Our vision statement is underpinned by a set of 15 Ambitions.

Through the RTP we will:

1. Develop a resilient, well-maintained, and efficient transport network that supports economic growth
2. Develop the infrastructure and services that provide people with a choice about how they travel for each journey
3. Improve sustainable access to employment and educational sites and tourist attractions
4. Improve access to key services
5. Encourage decarbonisation to be a cultural change that highlights the choice to travel by means other than the private car
6. Improve access to town and city centres for all sustainable modes
7. Reduce both exhaust and non-exhaust emissions from transport
8. Improve safety for all highway users
9. Reduce the need to travel

- 
10. Develop a transport network that provides social value for communities
  11. Make wellbeing a core consideration across all transport projects and programmes in North Wales
  12. Prioritise the Welsh language and culture
  13. Integrate equalities into all aspects of transport planning
  14. Integrate Investment Zone and the Freeport as regional considerations
  15. Identify synergies between the Regional Transport Plan and the Strategic Development Plan


The vision is supported by a set of four SMART Objectives, against which we can assess the impact of future transport policies and schemes and their role in delivering the vision for transport in North Wales. These SMART Objectives are:

1. **Improve digital connectivity and local services**
2. **Improved accessibility and transport choice**
3. **Enable decarbonisation through transition to a zero-emission fleet**
4. **Enable Sustainable Economic Growth**



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# 1. INTRODUCTION

## 1.1 PURPOSE AND CONTEXT

### 1.1.1 The Regional Transport Plan

Welsh Government has tasked Corporate Joint Committees (CJCs) in Wales with developing Regional Transport Plans for the region that they cover. The Regional Transport Plan for North Wales is, therefore, being developed by the North Wales CJC.

The CJCs across Wales are being empowered (and supported) to plan for services at a regional level, aligned with other regional and local planning priorities.

In the Guidance provided to the CJC, Welsh Government have set out ten key points for the development of the Regional Transport Plan, as set out in Appendix 1. The list can be summarised as:

Regional Transport Plans should:

- focus on achieving modal shift
- be brief
- Be developed in a co-productive and consultative way
- Closely aligned with Llwybr Newydd: the Wales transport strategy 2021
- be outcome-focused
- Where possible, supporting Welsh Government's aim to achieve net zero carbon status by 2050
- use innovative approaches and technology
- utilise existing analysis and plans
- be developed in partnership across the CJC region
- be developed following the five ways of working set out in the Well-being of Future Generations (Wales) Act 2015
- consider creative ways to engage people to achieve modal shift
- include disincentives for car use and incentives for more sustainable travel
- be developed alongside the Strategic Development Plan

The RTP will be developed in line with the Welsh Government Guidance, and in line with the other statutory duties of the CJC, including the Strategic Development Plan (SDP).

Before starting work on the RTP itself, we are setting out the Case for Change. This will:


- Set out the aim of the RTP
- Set out core SMART objectives that align with Llwybr Newydd
- Draw on the Wales Transport Strategy and other national, regional and local strategies including the Wellbeing of Future Generation Act (Wales) 2015
- Take into account the findings of the North Wales Transport Commission
- Draw on existing knowledge of issues and opportunities for transport in North Wales.

### 1.1.2 Wellbeing

Llwybr Newydd (see Annex 1) refers to the importance of wellbeing within a travel context. The way we travel supports improved wellbeing, with health considerations including:

- improving air quality;
- reducing noise; and
- a more active lifestyle





The Clean Air Plan for Wales: Health Air, Healthy Wales states that 'Transport is now the largest source of NOx in Wales, predominantly due to emissions from road transport, accounting for approximately one third of emissions'. The strategy also describes how fundamentally, the health of the people of Wales depends on the quality of the environment in which we all live.

The wellbeing context around our transport requirements are significant and must be fully factored into any project or programme in North Wales. WelTAG assessments will be used, where appropriate, to make sure that transport investment decisions take well-being goals into account. We know that transportation underpins and supports the premise of the 7 Wellbeing Goals, and for any future travel related project or programme, due regard must be paid to the principles and aim of the Wellbeing Goals:

- A prosperous Wales – a transport system that provides strong and reliable routes to places of work and study
- A resilient Wales – a North Wales transport system that can maintain a high standard under challenging circumstances
- A healthier Wales – through moving towards a transport system that promotes Active Travel, adopts a modal shift approach and provides facilities that reduces reliance on the combustion engine – focus will be to improve air quality, reduces noise
- A more equal Wales – a transport system that's open and accessible to all.
- A Wales of more cohesive communities – that Integrated travel plans in North Wales are tailored to the needs of different communities and focus on connectivity and accessibility
- A Wales of vibrant culture and thriving Welsh language – places of learning, culture and leisure are accessible via routes that don't promote reliance on the car
- A globally responsible Wales – with North Wales playing its part in achieving Net Zero through well thought through plans for decarbonisation


The importance of the 3<sup>rd</sup> sector needs to be recognised, particularly in the more rural areas where community-based minibuses provide a lifeline to those residents who do not have regular access to cars and in areas where public transport has reduced or is unavailable. For elderly people, community-based transport offers a lifeline to socialising, shopping, maintaining health and accessing healthcare.

Llwybr Newydd states that we must think differently about the way we travel. Referring to climate change it says that the 'climate emergency is one of the biggest defining issues of our time. If we are going to protect the lives of our children, we need to achieve net zero by 2050' This RTP needs to articulate how North Wales will move to a position where it has fewer cars on the road, with more people using public transport, walking or cycling – to do this will require a shift in thinking about how we approach our daily journeys – the journey from home to work, to visit friends and how do we travel to places of leisure and entertainment. The following Case for Change articulates how we start the journey.

## 1.2 Case for Change Structure

The remainder of this document sets out the Case for Change for the North Wales RTP. We start with the aim and objectives of the plan in Section Two. Sections Three, Four and Five demonstrate how we identified those objectives for the RTP by considering North Wales as a place (Section 3), how we travel (Section 4), and the Issues and Opportunities (Section 5).

Section Six sets out our Engagement Strategy, and Section Seven considers roles, responsibilities, and funding for the development and delivery of the RTP.



The national, regional, and local policies that are influencing the development of the RTP are considered in Annex 1: “Strategy and Policy Context”.

This Case for Change considers the evidence available at the time of RTP development. It is acknowledged that new and updated statistics and evidence relating to transport will emerge after the publication of the Case for Change. These will be considered in future iterations of the RTP and supporting documents.

Supporting evidence is included in Annex 2: “North Wales RTP Background and data and evidence paper”.

## 2. Identification of Objectives

### 2.1 Vision

It is intended that the vision for the RTP is an evolution of the strong vision statement that was included on the 2015 Joint Local Transport Plan<sup>1</sup>.

The Vision is also intended to support the delivery of Llwybr Newydd<sup>2</sup> in North Wales and progress the recommendations of the North Wales Transport Commission<sup>3</sup>. More details on those documents can be found in Annex 1.

The Vision for the North Wales RTP is:

**North Wales will have a safe, sustainable, affordable, resilient, and effective integrated transport network that supports economic growth, prosperity and well-being.**

This is a vision, and therefore by its nature is aspirational. It is intended that the vision statement is something that all authorities, partners and stakeholders in North Wales can work towards and contribute to.

The degree to which the Vision can become reality will depend on the level of investment available in transport from all sources in the coming years. Working closely together as the CJC alongside Welsh Government, with local authorities and Government across the border, other transport stakeholders, transport users, voluntary sector organisations, developers, and businesses, provides the best circumstances in which to achieve this vision.

### 2.2 Ambitions

Our vision statement is underpinned by a set of Objectives against which projects/ programmes will be assessed. These ambitions have been identified to align with the priorities of Llwybr Newydd, shown in Figure 2.1.

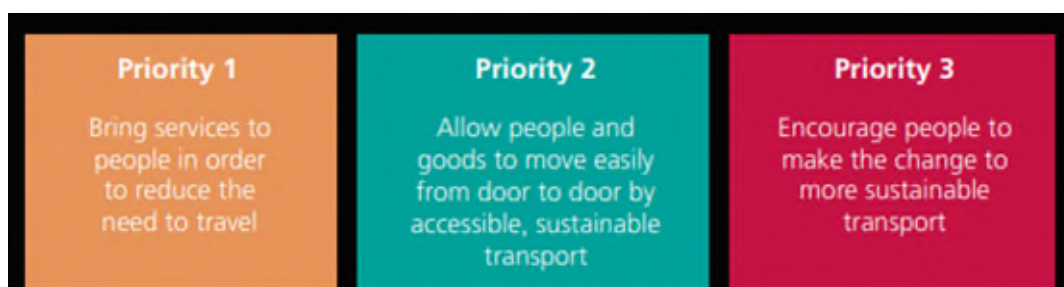


Figure 2.1 - Llwybr Newydd Priorities

The RTP ambitions are shown in Table 2.1.

<sup>1</sup> [North Wales Joint Local Transport Plan 2015 \(flintshire.gov.uk\)](http://flintshire.gov.uk)

<sup>2</sup> [Llwybr Newydd: the Wales transport strategy 2021 | GOV.WALES](http://gov.wales)

<sup>3</sup> [North Wales Transport Commission | GOV.WALES](http://gov.wales)



| Ambition<br>Through the RTP, we will: |   | Why this is important for North Wales   | Alignment with Llwybr Newydd: the Wales Transport Strategy 2021.  |
|---------------------------------------|---|---|---|
| 1                                     | <b>Develop a resilient, well-maintained, and efficient transport network that supports economic growth</b>              | A reliable and efficient transport system facilitates the movement of goods, access to tourist locations and people's access to jobs, education and services.   | Aligns and supports Llwybr Newydd through the provision of a transport system that 'contributes to our wider economic ambitions, and help local communities'                                  |
| 2                                     | <b>Develop the infrastructure and services that provide people with a choice about how they travel for each journey</b> | Too many journeys in North Wales require people to have access to a private car. This limits options for people who do not have a car and leads to an increase in congestion and emissions. By providing options for travel we create a more equitable network that serves all residents. | Objective aligns with Llwybr Newydd through preventing 'future problems by reducing congestion in order to drive modal shift to active travel and public transport.'                          |
| 3                                     | <b>Improve sustainable access to employment and educational sites and tourist attractions</b>                           | A successful regional economy requires residents to be able to access employment and training opportunities. This includes cross-border opportunities. Continued growth of the tourism sector is dependent on visitors being able to access attractions.                                  | Objective aligns with the Strategy's drive to be 'Good for the economy and places in Wales'   |
| 4                                     | <b>Improve access to key services</b>   | It is vital that all North Wales residents can access services such as hospitals, dentists, GP practices, banks, shops etc. This is particularly prevalent for Anglesey residents who may need to cross the Menai to access such services.  | Objective aligns with Priority 2 by improving the reliability, safety and frequency of public transport and working to extend the 'geographical reach' of public transport in a creative way. |



| Ambition<br>Through the RTP, we will: |   | Why this is important for North Wales   | Alignment with Llwybr Newydd: the Wales Transport Strategy 2021.   |
|---------------------------------------|---|---|--|
| 5                                     | <b>Encourage decarbonisation and a culture change that sees people who have a choice travelling by means other than the private car</b> | <p>It is vital that we reduce emissions from transport, and an increase in EV use will support this, but it is only through reducing car use that we will reduce local environmental impacts of traffic, congestion, and parking, and improve health.</p> <p>In some locations, this culture change can be encouraged by stimulating the community to identify local solutions.</p> | <p>Objective aligns with Priority 3 through encouraging people in North Wales to make the change to more sustainable modes of transport through a modal shift approach. Through encouraging behaviour change, exploring car-share options and options exploring digital opportunities to look at effective journey planning and booking.</p> <p>Welsh Government's target of 45% of journeys to be made by public transport, walking and cycling by 2040 will be a key consideration in transport planning and within the North Wales SDP.</p> |
| 6                                     | <b>Improve access to town and city centres for all sustainable modes</b>  | <p>Town and city centres are at the heart of North Wales communities, and their continued success and regeneration will be supported by ensuring that residents and visitors can travel to them via a choice of modes.</p>  | <p>This objective aligns with Welsh Government priorities through alignment with a Town Centre First approach through, where possible, locating new public services close to where people live leading to reduced travel and where possible, linking in to existing routes. This must also take into consideration the needs of those living in more rural and remote areas and a key consideration within the SDP.</p>  |





| Ambition<br>Through the RTP, we will: |   | Why this is important for North Wales  | Alignment with Llwybr Newydd: the Wales Transport Strategy 2021.   |
|---------------------------------------|---|--|--|
| 7                                     | <b>Reduce both exhaust and non-exhaust emissions from transport</b> | <p>Reducing CO2 emissions will help us address the global climate emergency. Other pollutants, such as NO2 and particulate matter, impact on local air quality and are associated with a number of adverse health impacts.</p> <p>It is acknowledged that private cars will continue to play an important role for journeys, especially in rural areas, so a switch to zero emission vehicles should be facilitated.</p> | <p>Objective aligns with Well-being ambitions through the drive to improve air quality and reduce environmental noise associated with transport – these factors will be considered within the North Wales Strategic Development Plan.</p> <p>This objective aligns with the drive to reduce greenhouse gas emissions from transport – the RTP will be mindful of UK Climate Change Committee’s carbon reduction pathway for surface transport.</p> |
| 8                                     | <b>Improve safety for all highway users</b>                         | <p>Our highway network should be considered safe for all, particularly more vulnerable road users.</p>   | <p>Alignment with Llwybr Newydd can be identified through ensuring identified/priority projects and programme across North Wales address congestion pinch points, invest in schemes that support road safety, journey reliability, resilience, modal shift and provide safety for all highway users.</p>   |
| 9                                     | <b>Reduce the need to travel</b>                                    | <p>Changes in culture since the COVID-19 pandemic, and improvements in technology have seen a reduction in the need for travel. Working from home for example or in a more hybrid way. This has a positive impact on reducing parking pressure, traffic congestion, peak travel time pressures and pollution.</p>  | <p>Objective aligns with Llwybr Newydd through supporting and encouraging digital and other innovations that reduce reliance on the car contributing to decreasing congestion, reducing carbon emissions specifically at peak hours.</p>   |



| Ambition<br>Through the RTP, we will: |  | Why this is important for North Wales   | Alignment with Llwybr Newydd: the Wales Transport Strategy 2021.  |
|---------------------------------------|--|---|---|
| 10                                    | <b>Develop a transport network that provides social value for communities</b>                          | It is important that our transport network reflects the needs of residents and communities. A transport network that recognises social value supports the delivery of other strategic aims and aspirations set at a local, regional and national level. | Through supporting Connected Communities, WG's strategy for tackling loneliness and social isolation will be supported through implementing this objective. Transport is one of the 8 pillars of an age-friendly community, and this will be demonstrated through local/community-based projects and programmes including the fflecsi bus and working with 3 <sup>rd</sup> sector partners.   |
| 11                                    | <b>Make wellbeing a core consideration across all transport projects and programmes in North Wales</b> | The wellbeing of all residents across North Wales must be a core consideration of all transport related projects and programmes   | Objective aligns with the principles outlined in Llwybr Newydd by;<br>Equality – with inclusivity and reducing barriers to economic activity and leisure opportunities being key to projects and programmes<br>Health – Through focussing on a modal shift, reduce air pollution supporting cleaner air<br>Confidence & Safety – Prioritising safety, strengthening communities through effective transport, supporting social connections – e.g. the fflecsi bus.<br>Environmental – through reducing emissions and reducing the local environmental impact of traffic |



| Ambition<br>Through the RTP, we will: |  | Why this is important for North Wales   | Alignment with Llwybr Newydd: the Wales Transport Strategy 2021.   |
|---------------------------------------|--|---|--|
| 12                                    | <b>Prioritise the Welsh language and culture</b>                   | Our transport system should provide sustainable access to cultural and Welsh language activities and events. It is important that the provision of information, including bookings and digital information/systems, is provided in both Welsh and English.  | Alignment is through underpinning the Welsh Language (Wales) Measure 2011 and contributing towards the achievement of a million Welsh speakers by 2050.  |
| 13                                    | <b>Integrate equalities into all aspects of transport planning</b> | Equalities is a key consideration for North Wales - with a wide and diverse demography living in rural, semi-rural and urban localities and communities - ensuring parity of access is key to a successfully delivered RTP. We will make transport services and infrastructure accessible and inclusive by aiming to remove the physical, attitudinal, environmental, systemic, linguistic and economic barriers that prevent people from using sustainable transport We will aim to remove the physical, attitudinal, environmental, systemic, linguistic and economic barriers that prevent people from using sustainable transport, including walking, cycling and public transport. | This objective will support the Equality pathway through ensuring transport accessibility and identifying areas requiring strengthening. It will also promote inclusivity and identify where things aren't working in the way they should be. A key area for consultation will be prioritising embedding equality and accessibility into transport planning across North Wales |



| Ambition<br>Through the RTP, we will: |   | Why this is important for North Wales   | Alignment with Llwybr Newydd: the Wales Transport Strategy 2021.   |
|---------------------------------------|---|---|--|
| 14                                    | <b>Integrate Investment Zone and the Freeport as regional considerations.</b> | <p>The Freeport in Holyhead, Ynys Mon will operate as a hub for global trade, innovation and investment, supporting local talent and embracing new employment opportunities. Therefore, reliable and frequent transport links will be critical to its success and designed with a carbon neutral approach as well as active travel considerations where possible.</p> <p>With Wrexham and Flintshire identified as areas for investment through a financial allocation by UK Government, transport links and considerations will be key in terms of making the area attractive for investment and for high calibre workforce.</p> | <p>This objective is supported by working towards a more strategic approach to Welsh ports, potentially recognising their role as a catalyst for co-location of manufacturing, energy, distribution, and leisure. Transport will be a key consideration here specifically a low carbon approach.</p> |
| 15                                    | <b>Identify synergies between the RTP and the SDP</b>                         | <p>Though the timescales for SDP and the RTP don't align, priority will be given to cross referencing, identifying dependencies/synergies, mutual benefits must be continuous.</p>  | <p>Both the planning process and the transport planning process should support and encourage the use of sustainable transport.</p>   |

Table 2.1 - RTP Ambitions



## 2.3 SMART Objectives

Alongside the Regional Transport Plan, we are developing a Regional Transport Delivery Plan (RTDP) that will set out the schemes and programmes that we intend to deliver over the next five years to achieve our vision. To prioritise the list of schemes and programmes in the RTDP we will be assessing them against a set of SMART objectives. These objectives have been identified to support the delivery of national policy and our regional ambitions, as shown in Figure 2.2.

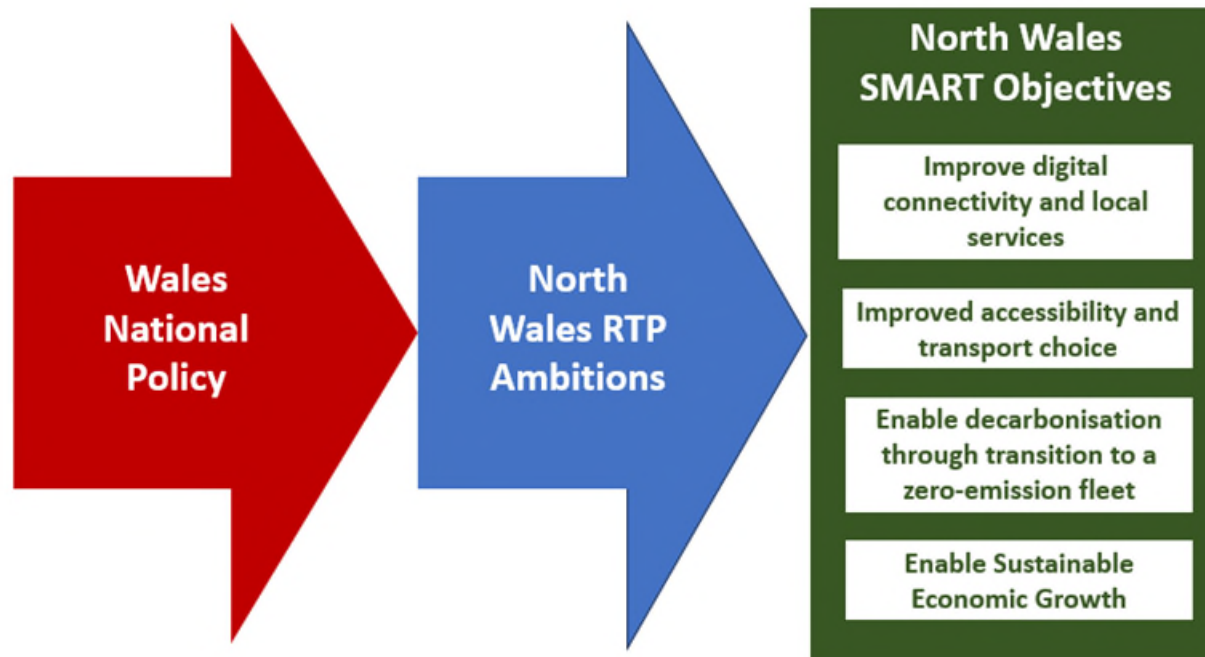


Figure 2.2 - Developing SMART Objectives





The SMART objectives that we have used to assess and prioritise schemes are:

## Regional Transport Plan SMART Objectives

### 1. Improve digital connectivity and local services:

We will enable 30% or more of people in North Wales to work remotely by 2030 through better land use planning and improved digital connectivity, which should reduce the overall need to travel and enable shorter trips better suited to sustainable modes.

### 2. Improved accessibility and transport choice:

We will develop infrastructure and services that provide people with a choice about how they travel for each journey, and support sustainable economic growth through improved access to key settlements, employment, educational sites and tourist attractions. The accessibility of each key trip attractor should be improved, supporting the national mode share target of 45% of journeys to be undertaken by walking, cycling and public transport by 2040.

### 3. Enable decarbonisation through transition to a zero-emission fleet:

We will develop supporting infrastructure and support incentives to enable at least 50% of motor vehicles and all public buses operating in North Wales to be zero emission by 2035.

### 4. Enable Sustainable Economic Growth:

We will develop a resilient, safe, well-maintained, and efficient transport network that delivers sustainable economic growth by improving accessibility to existing and planned employment areas. At least 50% of households in North Wales will have an increased range of travel within 1 hour by public transport, supporting access to key employment sites and regional centres.

## 3. North Wales

### 3.1 North Wales – A Great Place to Live, Work and Visit

The North Wales region comprises the local authorities of Isle of Anglesey, Wrexham, Conwy, Flintshire, Denbighshire and Gwynedd, as shown in Figure 3.1.

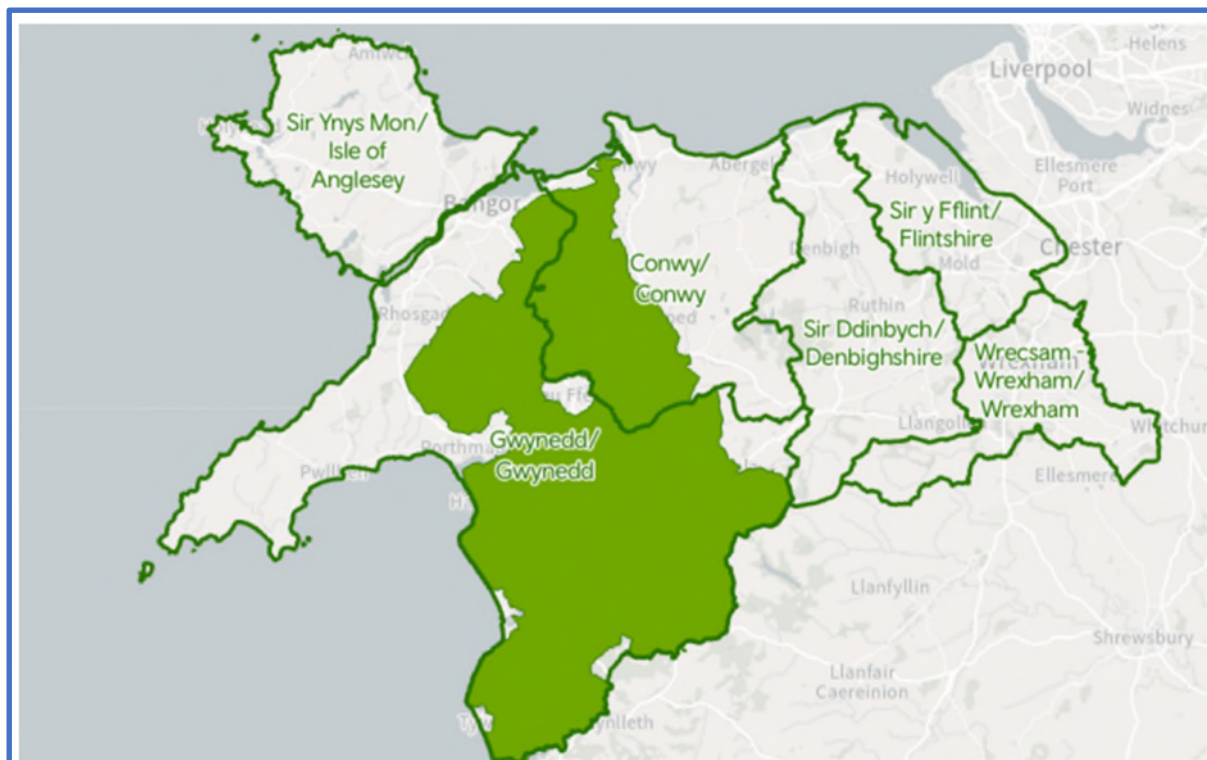


Figure 3.1 – Local Authorities in North Wales, with Eryri National Park in Green

Welsh Government and Ambition North Wales's Regional Economic Framework describes North Wales as a 'region with a wealth of attributes' and is clearly evidenced through the rich and unique nature of the area. From the more industrial and populous conurbations in the East to the more rural and less densely populated communities in the West, we can see the diverse nature of North Wales with its rich and diverse offer to both residents and its many visitors and tourists.

Educationally, North Wales offers two Higher Education Institutes (HEI's), Prifysgol Bangor University in West and Wrexham University in the East, both with a wide draw from all over the UK as well as overseas. Two Further Education Institutes (FEI's), Grwp Llandrillo Menai and Coleg Cambria provide strategically situated main sites serving both the urban and rural communities and are supported by conveniently located satellite colleges.

Culturally, North Wales offers brilliantly located theatres and cinemas offering many exciting productions which draw in audiences from far and wide catering for both younger and older audiences and all in between. Towards the West, Eryri and the surrounding area has so much to offer through an exciting range of outdoor activities including cycling, mountaineering, the creativity of Zip World and the adrenaline inducing experience of the National White-Water Centre in Bala.

Travelling by road from east to west via the A55, using the coastal train line or by bus, we travel through popular seaside communities, skirting an Area of Outstanding Natural Beauty (AONB) and castles which attract so many visitors to the area. With Welsh Government now exploring options

around a second National Park through a Northeast Wales National Park designation project, incorporating lessons learnt from other localities at an early stage will enhance planning around any future transport/accessibility strategy.

North Wales is famous for its quartet of UNESCO listed castles as well as a range of beautiful National Trust properties and other homes and monuments of interest. Wales' most recent addition to the World Heritage list, The Slate Landscape of Northwest Wales consists of six separate sites around the Gwynedd area including areas of interest of the Welsh slate industry. There are also many Cadw sites and other historic buildings and museums that attract a large number of visitors. Effective accessibility to these sites using methods other than the car will be explored.

The more urban Northeast region boasts a rich cultural heritage including an 11-mile-long UNESCO World Heritage Site and a site that hosts the annual international Eisteddfod in Llangollen. In 2022, we saw Wrexham successfully achieve city status in the Queen's Platinum Jubilee City Status competition. It was also a finalist for UK City of Culture in 2025.

From an economic perspective, North Wales contributes £14.2 billion to the UK economy each year. Recent economic performance has been resilient but there remains a persistent and growing productivity gap resulting in some variations in productivity within the area. The economy is diverse with key sectors being manufacturing, energy and tourism as well as public sector jobs. Some of the productivity gap is accounted for by the sectoral structure of North Wales but there are areas of significant and growing strengths and opportunity, particularly in advanced manufacturing, low carbon energy, agri-food & tourism and the digital sectors. Significant opportunities for Wrexham and Flintshire can be identified through UK Government's 10-year £160m Investment Zone (IZ) in Wrexham and Flintshire. Announced in the Autumn Statement in 2023, Investment Zones provide an opportunity to embed innovation throughout the economy. They support the growth of priority sectors, leveraging existing strengths to drive rapid expansion - it is anticipated that IZ will not only benefit Wrexham and Flintshire but across North Wales too. Moving towards the West, Cyngor Ynys Mon and Stena Line successfully bid for Holyhead to secure Freeport status, this investment has the potential to deliver real, transformational change in communities across Anglesey and the wider North Wales region.

## 3.2 Population

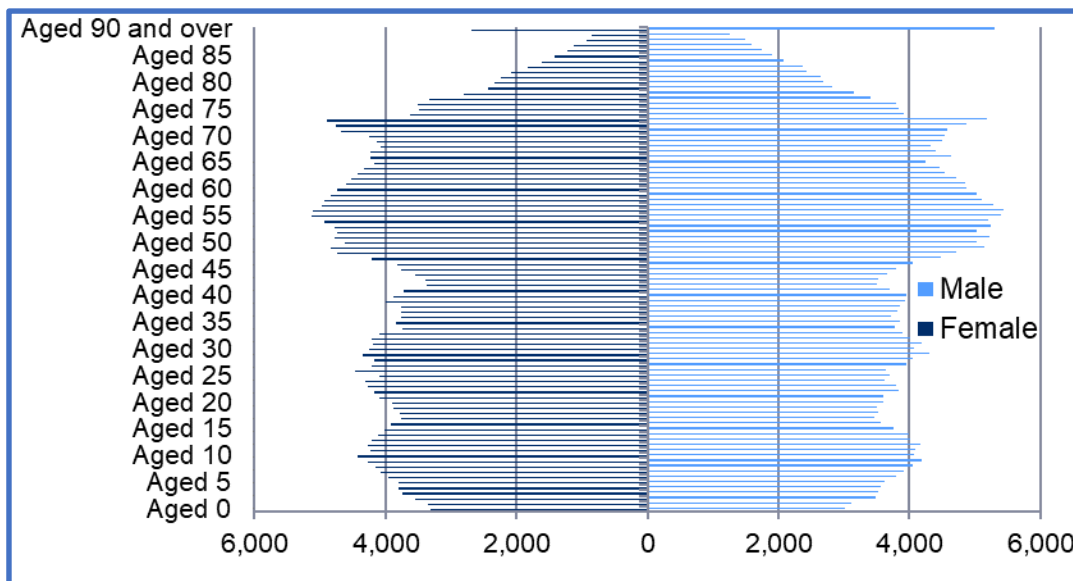
Based on population estimates for mid-year 2021, Wales is home to over 3,105,000 residents. North Wales has an estimated population of nearly 700,000. The most populous local authority in North Wales is Flintshire with over 150,000 people. The least populated is the Isle of Anglesey with just under 70,000 people, making it the third smallest local authority in Wales by population. The population of each local authority area is shown in Table 3.1.

| Area             | Mid-year 2020 Population |
|------------------|--------------------------|
| Wales            | 3,105,000                |
| North Wales      | 687,098                  |
| Isle of Anglesey | 68,944                   |
| Gwynedd          | 117,072                  |
| Conwy            | 114,828                  |
| Denbighshire     | 96,046                   |
| Flintshire       | 155,076                  |
| Wrexham          | 135,132                  |

**Table 3.1 - Population estimates by local authority and year<sup>4</sup>**

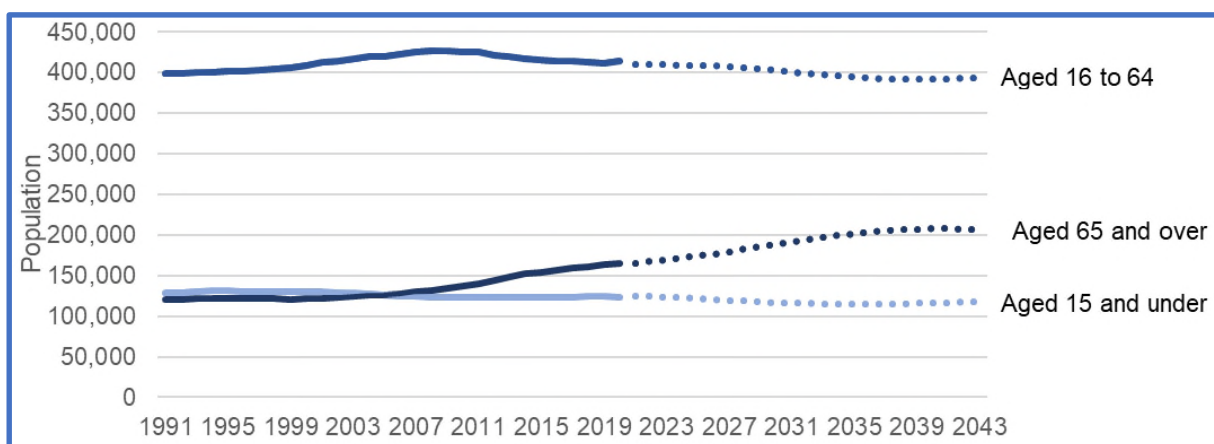
The population of Wales is ageing; this means that there is a greater proportion of older people as a share of the total population. This is projected to continue as people live longer and the number of births remains low. Factoring this change in demography into the way we plan transport in North Wales needs to be reflected in the RTP.

The estimated percentage of the population aged 65 and older in Wales was 21% in 2020. For North Wales it was over 23% or almost 1 in 4 people. In Conwy 28% of the population was aged 65 and older, the highest percentage of all local authorities in Wales. The population of North Wales by age and gender is shown in Figure 3.2.



**Figure 3.2 - Estimated population of North Wales by age and sex, mid-2020<sup>5</sup>**

The projected increase in population aged over 65 is shown in Figure 3.3. By 2040 it is projected that around 29% of the population of North Wales will be aged 65 or over.



**Figure 3.3 - Population estimates and projections for North Wales by broad age group and year, 1991 to 2043<sup>6</sup>**

<sup>4</sup> [Population estimates by local authority and year \(StatsWales\)](#)

<sup>5</sup> [Population estimates by local authority and year \(StatsWales\)](#)

It should be noted that the projection figures are based on trends from 2018 and do not take into account the impacts of the COVID-19 pandemic or Brexit.

2.5% of the population of North Wales described themselves as Black, Asian or minority ethnic in 2018-20 compared to 5.0% of the Welsh population as a whole (Annual Population Survey), as shown in Table 3.2

| Area        | White | Mixed/Multiple ethnic groups | Asian | Black / African / Caribbean / Black British | Other ethnic groups |
|-------------|-------|------------------------------|-------|---|---------------------|
| Wales       | 95.0% | 0.9%                         | 2.3%  | 0.9%  | 0.8%                |
| North Wales | 97.5% | 0.7%                         | 0.9%  | 0.3%  | 0.6%                |

**Table 3.2 - Percentage of population by ethnic group, Annual Population Survey, 2018-20**

Across Wales, North Wales had the lowest proportion of people identifying as disabled (20.1%) in 2018-20, while Southeast Wales and Mid and Southwest Wales had similar proportions (22.6% and 23.0% respectively) (Annual Population Survey).

### What this means for the RTP

As part of the RTP development, an Equalities Impact Assessment will be undertaken to ensure appropriate consideration is given to people in North Wales with protected characteristics.

### 3.3 Welsh Index of Multiple Deprivation

The Welsh Index of Multiple Deprivation (WIMD) is the Welsh Government's official measure of relative deprivation for small areas in Wales. It is designed to identify those small areas where there are the highest concentrations of several different types of deprivation.

Deprivation is the lack of access to opportunities and resources which we might expect in our society. This can be in terms of material goods or the ability of an individual to participate in the normal social life of the community. There are 1,909 Lower-layer Super Output Areas (LSOAs) in Wales, with 22% of these in North Wales. Considering the 191 most deprived LSOAs across all of Wales in 2019 (i.e. the 10 per cent most deprived), 12% are in North Wales.

In WIMD 2019, there were pockets of high relative deprivation in some North Wales coastal and border towns. This is shown in Figure 3.4.

<sup>6</sup> Population estimates by local authority and year (StatsWales)



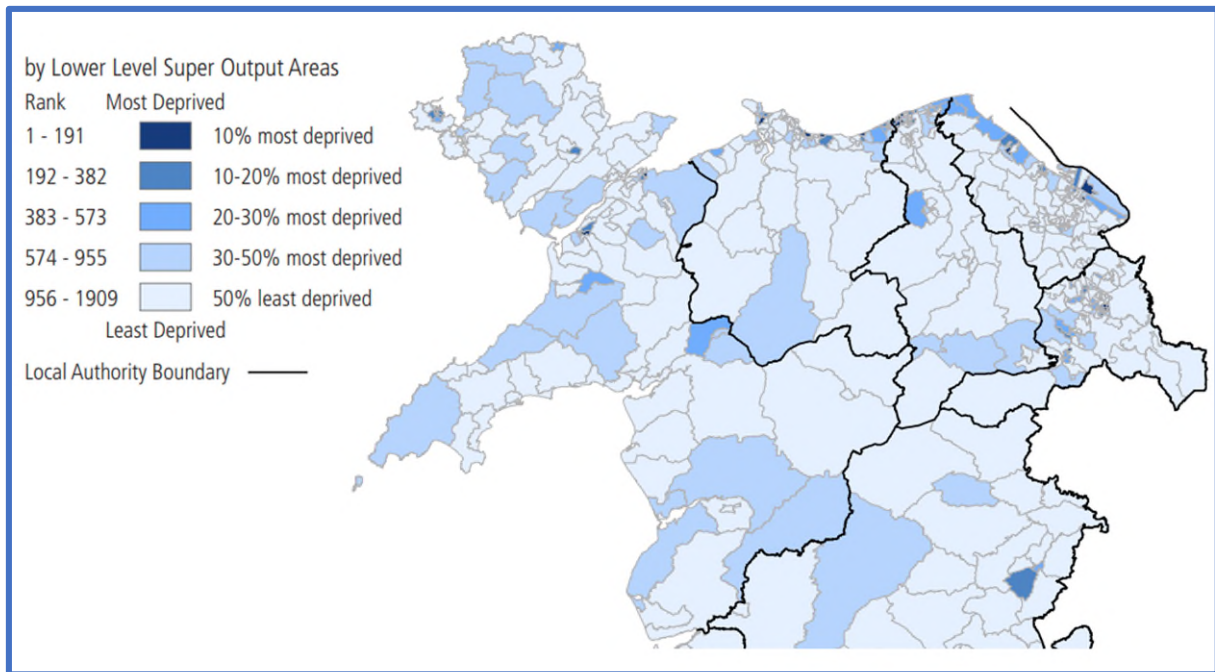


Figure 3.4 - Welsh Index of Multiple Deprivation<sup>7</sup>

## What this means for the RTP

Attractive, efficient transport links can play a vital role in reducing deprivation by providing access to jobs, training, health/wellbeing opportunities and education.

### 3.4 Population Density

In 2021, Wales had an average population density of 149.8 persons per square kilometre. This is an increase of approximately 8% in the two decades since 1991, but a decline of approximately 2% year on year compared to 2021. Wales has a relatively low population density, compared to the UK as a whole, where the equivalent figures is 276 people per square kilometre.

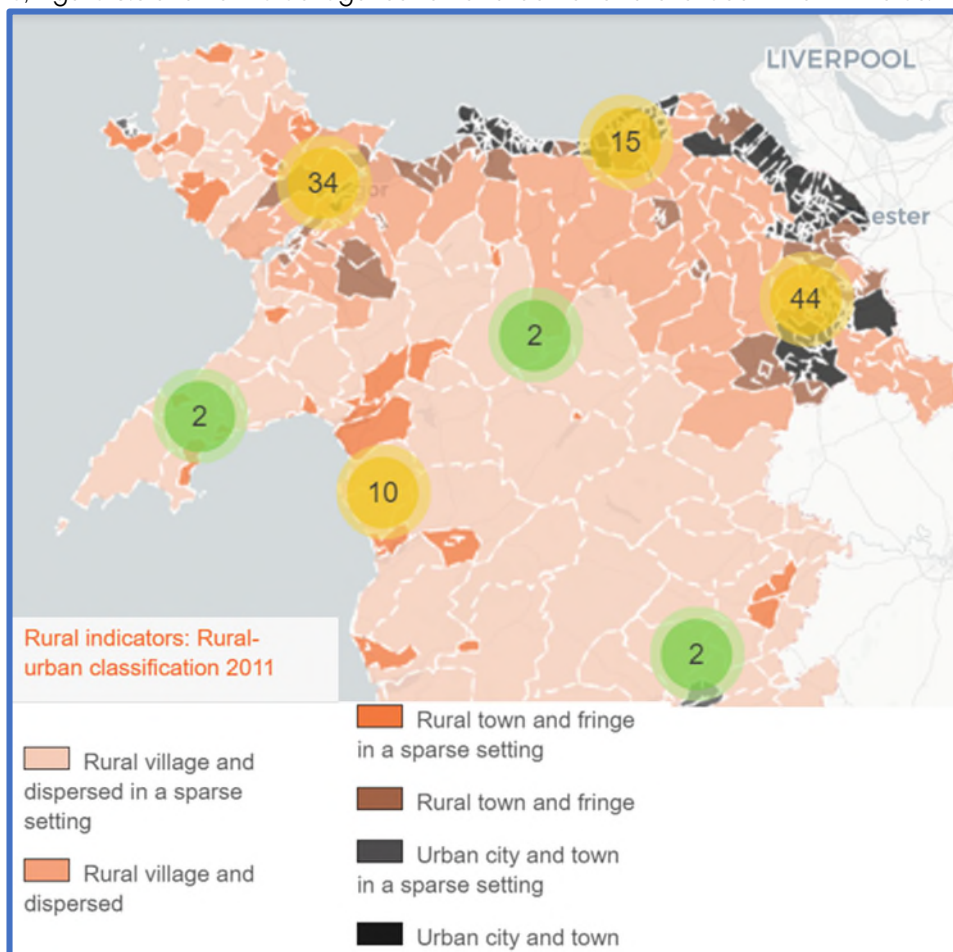
North Wales is less densely populated than Wales as a whole. The population density of each of the six local authority areas in the region is shown in Table 3.3. Population density varies considerably across North Wales, with Flintshire and Wrexham more densely populated than other local authorities in North Wales. Gwynedd is estimated to have less than 50 people per square kilometre making it the third least densely populated local authority in Wales.

| Area             | Mid-year 2020 |
|------------------|---------------|
| Wales            | 149.8         |
| Isle of Anglesey | 96.8          |
| Gwynedd          | 46.2          |
| Conwy            | 102.0         |
| Denbighshire     | 114.8         |
| Flintshire       | 352.6         |
| Wrexham          | 268.2         |

<sup>7</sup> [WIMD - Home Page \(gov.wales\)](https://gov.wales/wimd)

**Table 3.3 - Population density (persons per square kilometre) by local authority<sup>8</sup>**

2011 Census data has been used to inform the data on the 'Understanding Welsh Places' website<sup>9</sup>. From this website, Figure 3.5 shows the categorisation of urban and rural areas in North Wales.



**Figure 3.5 - Rural-Urban Classification in North Wales**  
(Note: Numbers on the map refer to more detailed information available from the source)

Figure 3.5 demonstrates a stark contrast between the urban areas of the east of the region and along the north coast, and the more rural areas comprising much of the rest of the region.

It can often be more difficult for people living in rural communities to access services that may be more accessible in urban areas. Poor access to services is a factor which can compound other types of deprivation that exist in an area. The WIMD Access to Services data demonstrates deprivation as a result of a household's inability to access a range of services that are considered necessary for day-to-day living, both physically and online. It considers average travel times to a range of services by private and public transport. The services considered are:

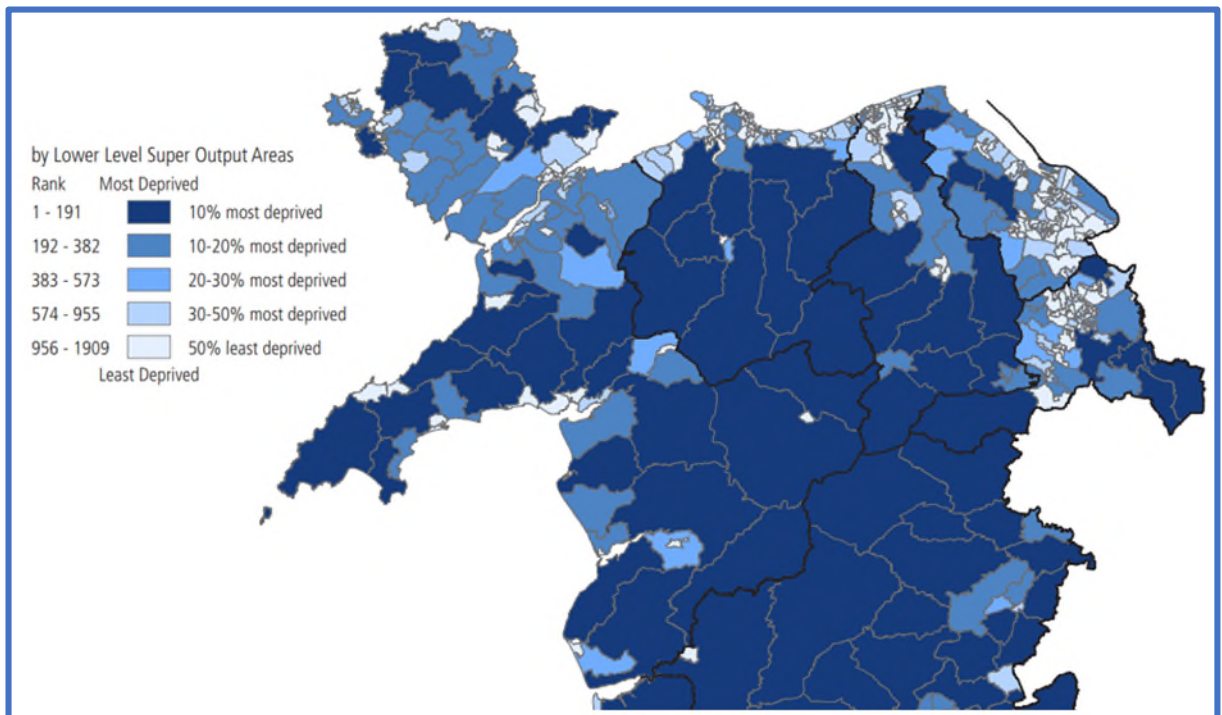
- Pharmacy,
- Food shop,
- General Practitioner (GP),
- Post office,
- Primary school,

<sup>8</sup> [Population density \(persons per square kilometre\) by local authority and year \(StatsWales\)](#)

<sup>9</sup> [Home | Understanding Welsh Places 0.1](#)

- Public library,
- Sports Facility,
- Secondary school and
- Petrol station (private transport only)

In this context, high deprivation is widespread across rural areas of Wales, as shown in Figure 3.6. This is a scenario that is becoming more challenging at time when local authorities are in position where they need to make cuts to subsidised bus budgets.



**Figure 3.6 - WIMD Access To Services**

The concentration of services and populations is in North-East Wales, cross-border, and along the North Wales coast. This reflects the less sparsely populated areas shown in Figure 3.5. Further evidence of the impact of rurality in North Wales can be seen in Transport for Wales analysis of journey time to access a key town or city centre using public transport, which can be seen in Figure 3.7.

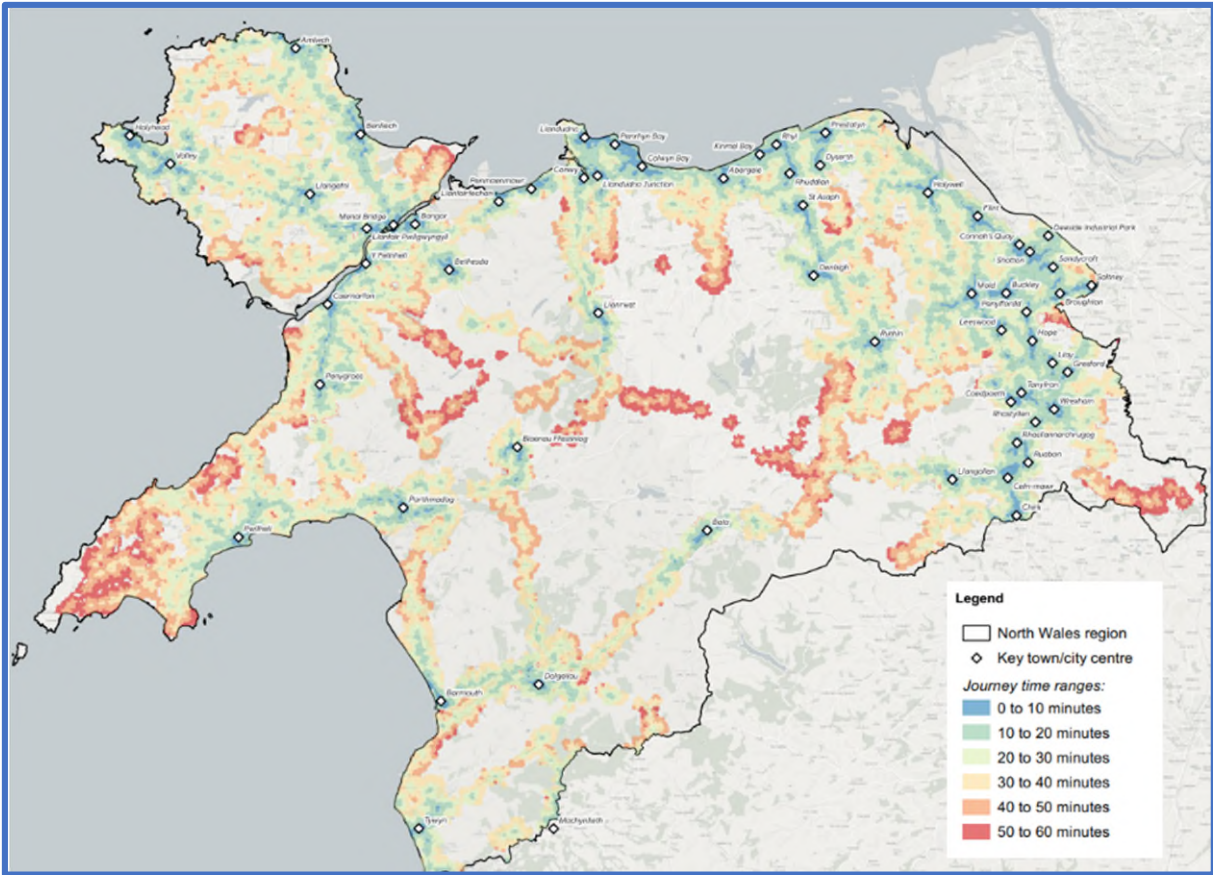


Figure 3.7 - Public Transport Journey Time to Key Town or City (Tuesday 07:00 - 19:00)

There are a large number of communities in rural areas who, if travelling by public transport, are required to travel for more than 50 minutes to access a key town or city.

The North Wales Transport Commission noted that *“Replacing car journeys with public transport and active travel in rural areas is challenging. We recognise that the private car will continue to be the main way many journeys are made by many people. North Wales includes large areas that are rural or semi-rural.”*

### What this means for the RTP

For the RTP to identify a wholly integrated and transformative network of sustainable transport in North Wales, a consideration of both the needs of residents of urban centres and rural communities is required. The RTP should recognise that whilst modal shift may be facilitated through enhanced public transport and active travel in and between our towns and cities, reducing car use in rural communities is more challenging. Facilitating a shift to low emission vehicles for residents of rural communities is therefore vital.

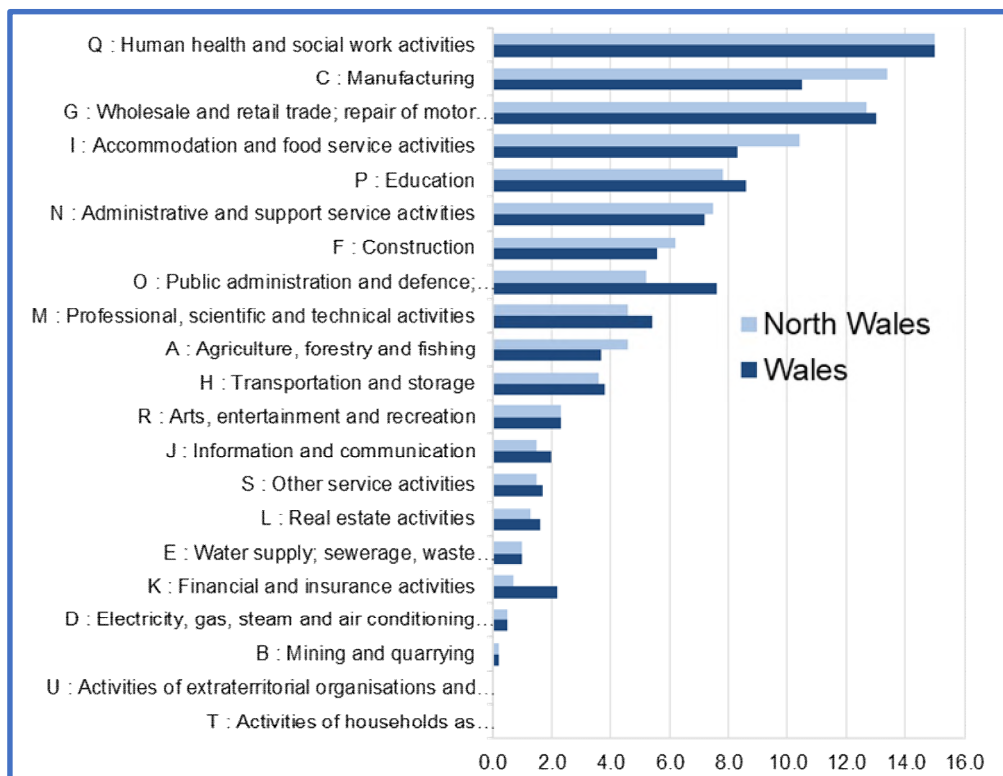
### 3.5 Employment in North Wales

The largest employment sector across Wales and in North Wales is ‘Human health and social work’. As can be seen in Figure 3.8, North Wales has a higher employment percentage than Wales in the following industries:

- Manufacturing,
- Accommodation and food service activities,
- Administrative and support service activities,



- Construction and
- Agriculture, forestry, and fishing.

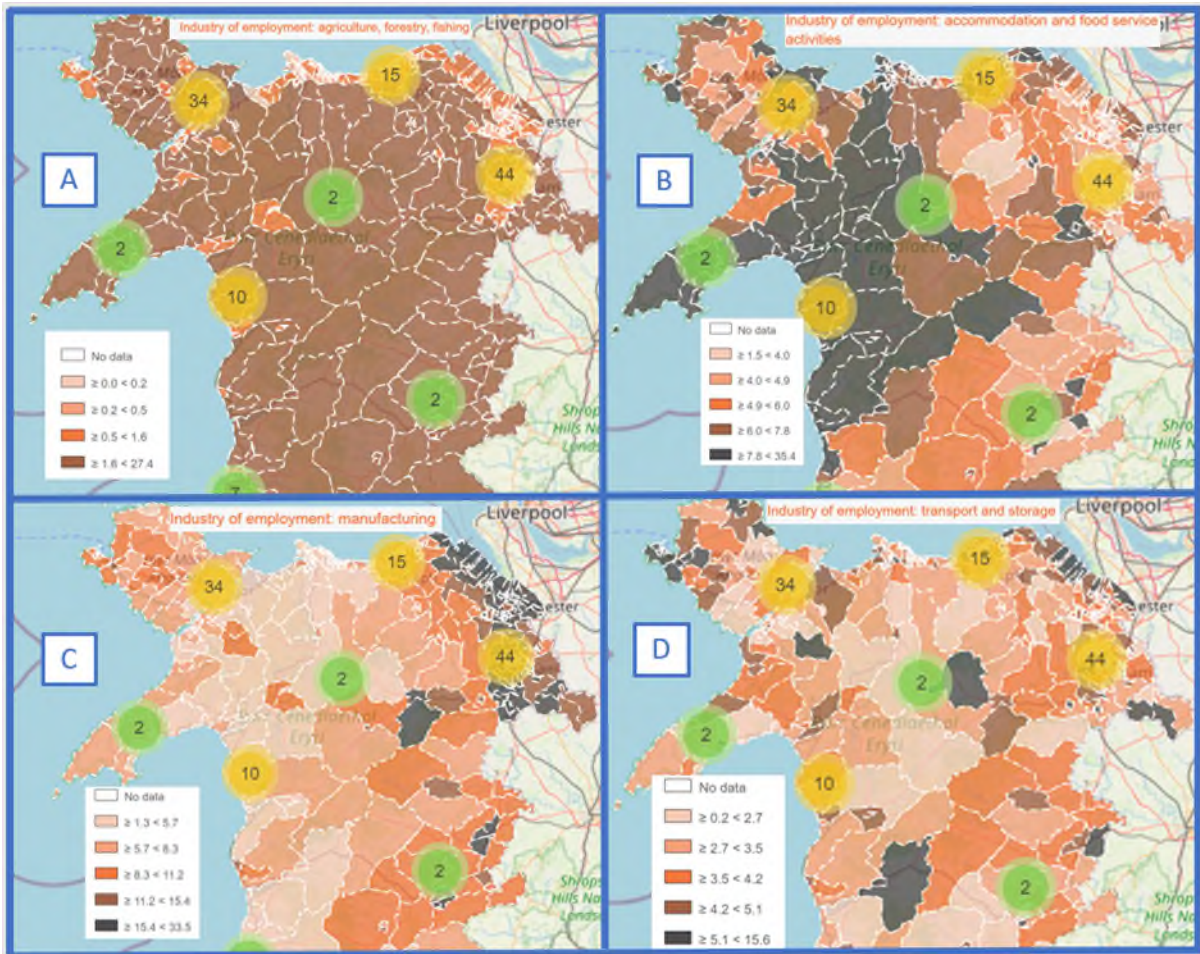


**Figure 3.8 - Percentage of total employment by Industry, North Wales and Wales**

Source: Welsh Government analysis of Business Register and Employment Survey, ONS

The importance of different employment sectors varies across North Wales. Figure 3.9 considers the percentage of resident population aged 16-74 who are employed in selected industry sectors. This shows that:

- The agriculture, forestry and fishing sector is unsurprisingly far more prominent in rural areas of North Wales, where up to 27.4% of people in this age bracket work in these sectors. This compares to less than 1% in the more urban areas.
- The accommodation and food services sector is far more prominent in Eryri, Llyn Peninsula and coastal areas of Denbighshire, Conwy and Anglesey, with up to 35.4% of people in this age bracket employed in this sector.
- The manufacturing sector is important in the east of North Wales, where areas of Wrexham and Flintshire have up to 33.5% of residents aged 16-74 employed in this sector.
- The transport and storage sector is far more prominent in parts of Flintshire and Wrexham, reflecting the areas where manufacturing is important. Transport and storage is also significant in parts of Anglesey, close to the port of Holyhead.



**Figure 3.9 - Prominence of different employment sectors in North Wales**  
 ('Understanding Welsh Places' website<sup>10</sup> - Note: Numbers on the map refer to more detailed information available from the source)

## What this means for the RTP

The RTP should support the continued economic development of North Wales by considering enhancing access to employment sites in the region for both current and future employees and, where applicable, customers. The requirements of the transport network vary across North Wales. In rural areas, employment may be seasonal and remote. In areas where tourism is significant, there is increased demand on the transport network in summer season. Where manufacturing and storage are key sectors, the considerations are the volume of trips to large employment sites, shift patterns, and the requirement for higher levels of HGV movements.

<sup>10</sup> [Home | Understanding Welsh Places O.1](#)

## 4. How We Travel

The dominant mode of transport in Wales, for both the number of journeys undertaken and distances travelled, continues to be the private car. The Wales Transport Strategy (WTS) target for 2040 is 45% sustainable modes and 55% car, so car will still dominate in 2040 even if that target is reached.

### 4.1 Active Travel

Local authorities in North Wales have a duty, under the Active Travel (Wales) Act 2013, to map existing and future active travel routes and related facilities, with an aim to lead to an integrated network for active travel use, and thus achieve modal shift for walking and cycling modes.

The Active Travel Network Map is available from [View map | DataMapWales \(gov.wales\)](#). Figures 4.1 and 4.2 show the comparison between the current on-ground active travel network shown on the Active Travel Network Map for the northeast of our region (Figure 4.1), and the future scheme aspirations (Figure 4.2) for the same area.

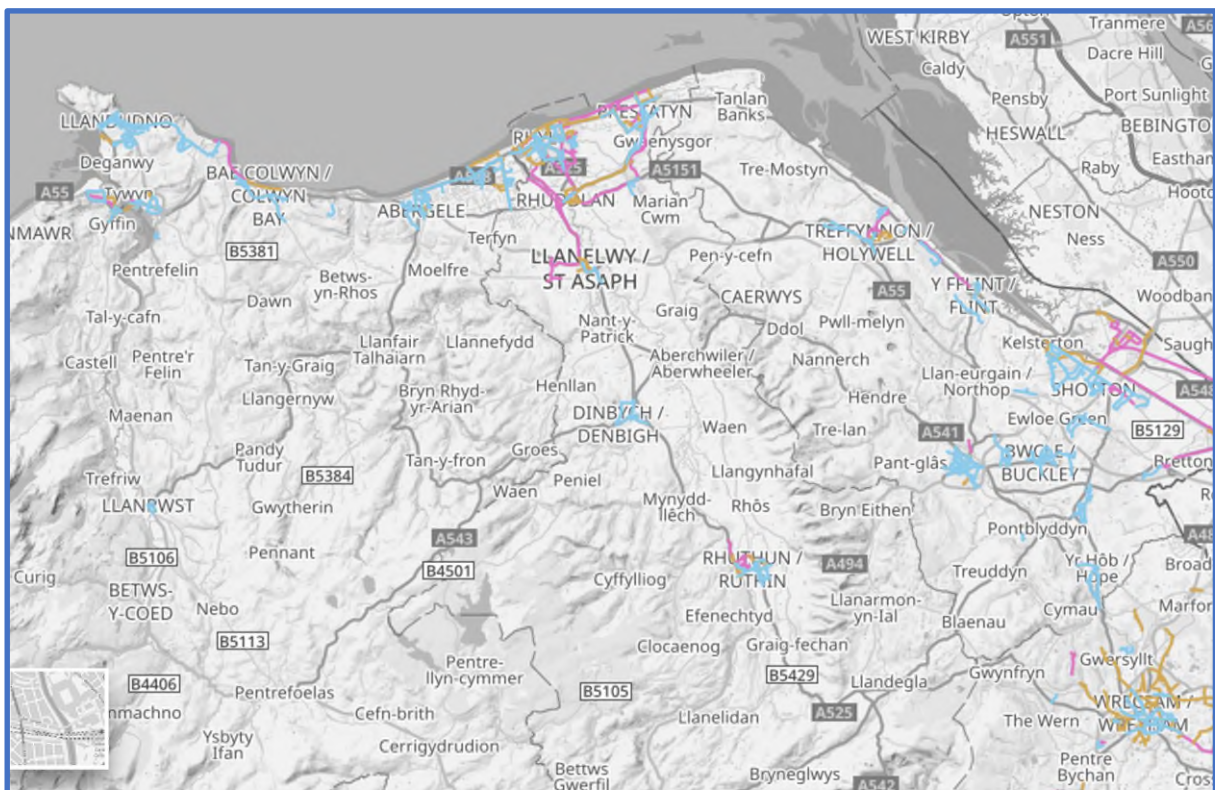


Figure 4.1 - Existing Walking and Cycling Routes on the Active Travel Network Map



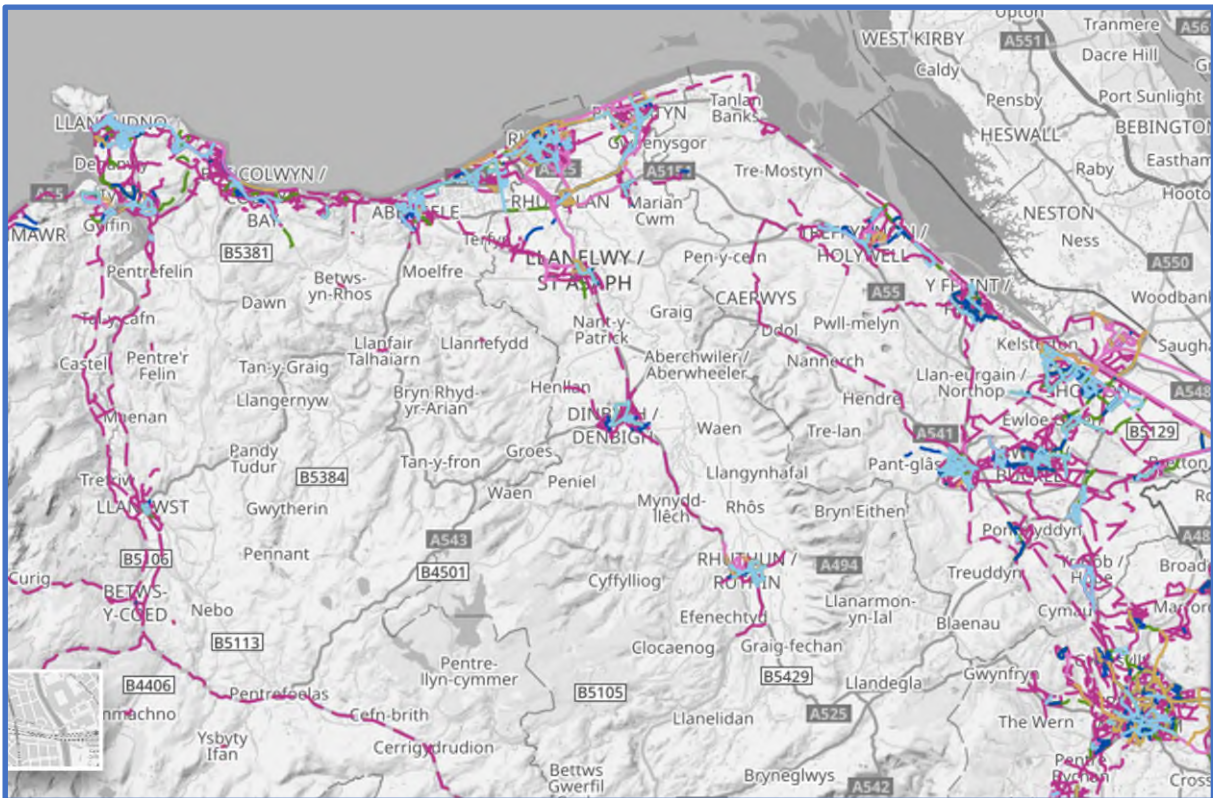


Figure 4.2 - Future Walking and Cycling Routes on the Active Travel Network Map

## What this means for the RTP

The RTP should outline proposals for further expansion and improvement of the active travel network in North Wales to encourage an increase in the number of people choosing to walk or cycle. This should focus on connections to key attractors such as employment and education sites, railway stations, bus stops, and tourist attractions.

## 4.2 Bus

Bus has the biggest public transport modal share in Wales. In 2018/19 a total of 101.87 million journeys were made by bus in Wales. Analysis undertaken by Transport for Wales' (TfW) Analytical Unit shows that 68% of the North Wales population live within a quarter of a mile (or 400 metre) walking route of a bus stop where services run at least once per hour.

Welsh Government and Transport for Wales have set out a Roadmap to Bus Reform that provides an outline to the approach to franchising in Wales. Bus franchising means that decisions about bus services in Wales (including routes, timetables, fares, hours of operation and service quality standards) will be made by Welsh Government and Transport for Wales. Decisions will be made in partnership with Corporate Joint Committees. Bus operators can bid for contracts to run services to these specifications. It is currently expected that franchising will be rolled out in North Wales in 2028.

A number of recent improvements have been made in collaboration between TfW, local authorities, and bus operators that have made bus travel more attractive in North Wales:

- The rollout of the 1bus ticket (one ticket across the vast majority of bus services in North Wales),
- T19/Conwy Valley Line return ticket agreements
- Continuous review of the Sherpa Network in Eryri

- Launch of the Traws Cymru T8 service between Corwen and Chester
- Launch of fflecsi demand responsive services, including the zero-emission electric service in Ruthin.

Further work is in development to address long-standing barriers to the uptake of bus travel, such as a Bus Network review and development of a pilot scheme underway between TrawsCymru and Rail to enable use of one ticket for journeys that involve a leg by rail and bus.

fflecsi is a demand responsive bus service that can be booked by passengers in advance of travel. fflecsi buses can pick passengers up and drop off in a service area and not just at a bus stop. Locations in North Wales where fflecsi services operate in 2024 are:

- Buckley
- Conwy Valley
- Denbigh
- Holywell
- Llyn Peninsula
- Prestatyn
- Rhuthin

The Snowdon Sherpa is a network of bus services that travel around Yr Wyddfa. It has been developed in by a partnership comprising Transport for Wales, Cyngor Gwynedd, the National Park Authority, and Gwynfor Coaches. The creation of the Sherpa network saw the merger of local bus services into one simplified brand and a coordinated network and fare structure. In August 2024 72,296 people used the Sherpa service, a 79 per cent increase on August 2023 and it was the first-time passenger numbers exceeded 70,000 in a month.

TrawsCymru longer distance bus services are an important part of the integrated public transport network in Wales. Funded by the Welsh Government, the buses provide vital public transport links for many communities across Wales, integrating with rail journeys and also giving visitors an accessible, affordable and environmentally friendly option for exploring Wales.

## What this means for the RTP

The RTP should consider proposals for further review and improvement of bus services and measures to encourage an increase in bus use. Bus services should focus on improving access to services from communities. They should connect to key attractors such as education and employment sites, railway stations and tourist attractions.

### 4.3 Rail

The national rail network in the region is managed and maintained by Network Rail, with passenger services operated by Transport for Wales and Avanti West Coast via the Wales and Borders and West Coast Partnership franchises. The rail network is reflective of the main population centres. There are 66 rail stations in North Wales. These are located on the following five lines:

- the North Wales Coastline,
- the Shrewsbury–Chester Line,
- the Conwy Valley Line,
- the Borderlands Line, and
- the Cambrian Line.

Data from the Office of Road and Rail is collected for estimates of station usage at each station on the network. Figures for the most and least used stations in North Wales are shown in Table 4.1.

Figures used in the table are for 2019-20 as this is the last full year not affected by the Covid 19 pandemic. Whilst not in Wales, Chester station is considered the most important station on the North Wales rail network due to its roles as both an attractor, and key interchange location.

| Station name       | 2019-20 highest number of entries and exits | Station name | 2019-20 lowest number of entries and exits |
|--------------------|---|--------------|--|
| Chester            | 5,093,756                                   |              |  |
| Bangor (Gwynedd)   | 624,926                                     | Dolgarrog    | 362  |
| Rhyl               | 504,244                                     | Pont-y-Pant  | 498  |
| Wrexham General    | 501,800                                     | Roman Bridge | 720  |
| Prestatyn          | 324,634                                     | Tal-y-Cafn   | 812  |
| Llandudno Junction | 301,418                                     | Tywyn        | 1,062                                      |

**Table 4.1 - The stations with the highest and lowest number of entries and exits**

Analysis undertaken by TfW's Analytical Unit shows that only 9% of the North Wales population lives within a half a mile walk (or 800 metres) of a rail station where services run at least once per hour.

Freight paths are in place across the network. There are limited freight services along the mainline, but the route between Shrewsbury and Chester, and the Borderlands Line see several services a week to the sawmill, steel, and cement plants.

### What this means for the RTP

Whilst rail is not directly influenced locally, it is important that the RTP acknowledges measures to enhance the rail offer in North Wales. To enhance services, the key priorities for improvements are the Borderlands Line, increasing capacity at Chester Station, and increased service levels on the North Wales Main Line.

The RTP should consider the importance of connections to key centres such as London, Cardiff, Manchester (including the airport), Liverpool, Crewe, and Warrington (for Northern Powerhouse Rail).

The Plan should consider sustainable travel links to interchange facilities at rail stations.

Through the RTP we should seek opportunities to increase rail freight in North Wales.

## 4.4 Road Network

Trunk roads in North Wales are the responsibility of Welsh Government and are maintained by the North and Mid Wales Trunk Road Agent (NMWTRA). The Trunk Road Network is shown in Figure 4.3 Maintenance and management of all other adopted roads area the responsibility of local authorities.

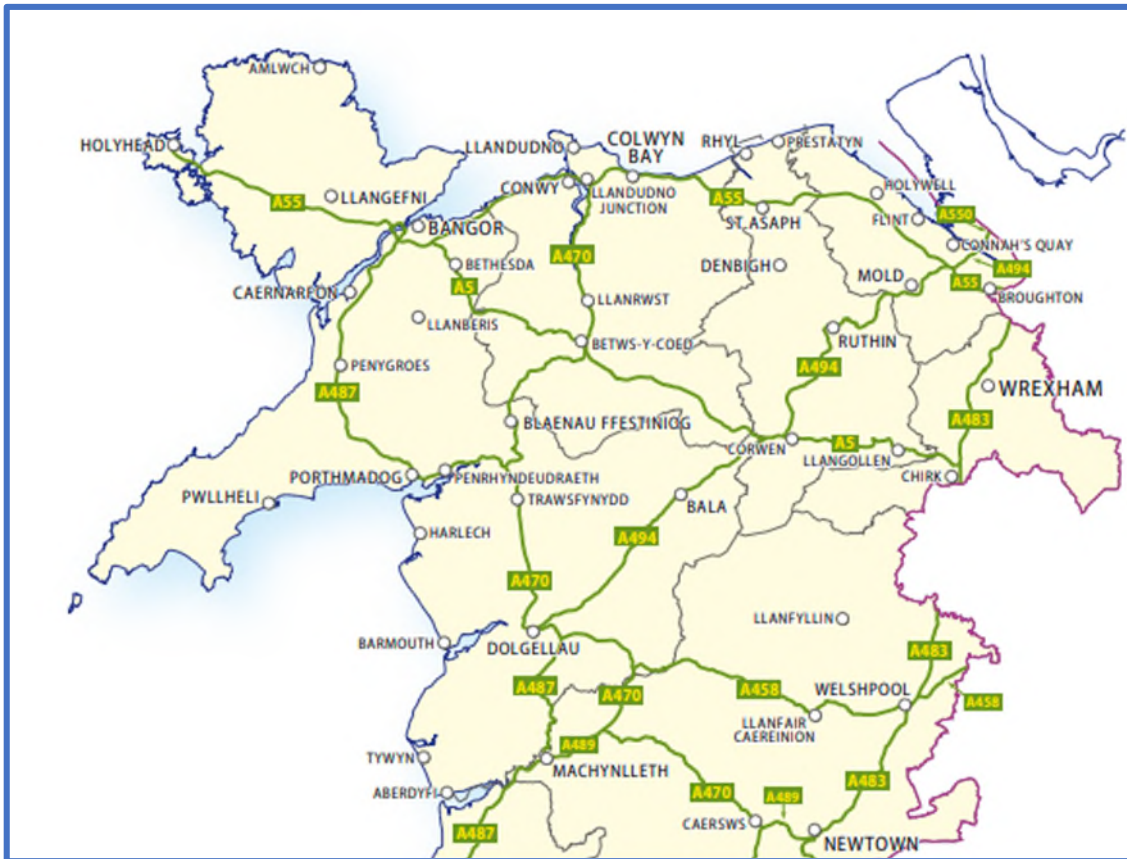


Figure 4.3 - The Trunk Road Network ([Our roads](#) | [Traffic Wales](#))

The main roads in North Wales mostly span east to west, especially along the North Wales coast. The busiest road in North Wales is the A55, the "North Wales Expressway", a dual carriageway primarily connecting Chester to Holyhead, along the coast of North Wales and passing Llandudno Junction, Conwy, and Bangor. It is one of Wales' most important roads that runs through to the port of Holyhead.

The crossing of the Menai to Anglesey, and the resilience of this route, is important both locally and strategically. Locally, although separated by the Menai Strait and in different local authority areas, towns on both sides of the Strait form a single economic area. Many people travel between locations across the Strait for employment and to access vital services such as education and healthcare as well as for leisure, shopping and entertainment opportunities.

Strategically, incidents on the Menai Crossings are particularly detrimental for freight operators who are accessing the port at Holyhead. Reliability and predictability of journey time is crucial for freight operators for whom deliveries may be time-critical, or time wasted on congested roads has a financial cost.

The A55 converges for a short distance with the A494 at Ewloe, from which the A494 runs to the North of Chester and the A55 to the South.

The A5 was previously the primary link between North Wales and London. The road crosses the Menai Suspension Bridge, but its importance has been superseded by the A55. Other roads transiting North Wales, from east to west include the A458 from Halesowen to Mallwyd, and the A494 from Dolgellau to Saughall.



The busiest north-south road travelling through the region is the A483 from Chester through Wrexham and onto Swansea via Oswestry, Newtown and Welshpool. Other major north-south roads include the single-carriageways of the A470 from Llandudno to Cardiff via the Conwy valley, and the A487 from Bangor to Haverfordwest via Caernarfon and Eryri.

The majority of the remaining highway network within the region are the responsibility of the relevant Local Highway Authority, in this case, the Local Authority. Significant changes planned for the Local Highway Network in the near future include the rollout of a 20mph speed limit along restricted roads.

## What this means for the RTP

Whilst seeking opportunities to encourage more people to travel by active travel and public transport, the RTP should acknowledge the importance of the road network to free movement around North Wales and seek to improve the resilience of this network. This is particularly important for crossings of the Menai, where incidents on the road network can isolate communities.

### 4.5 Electric Vehicles

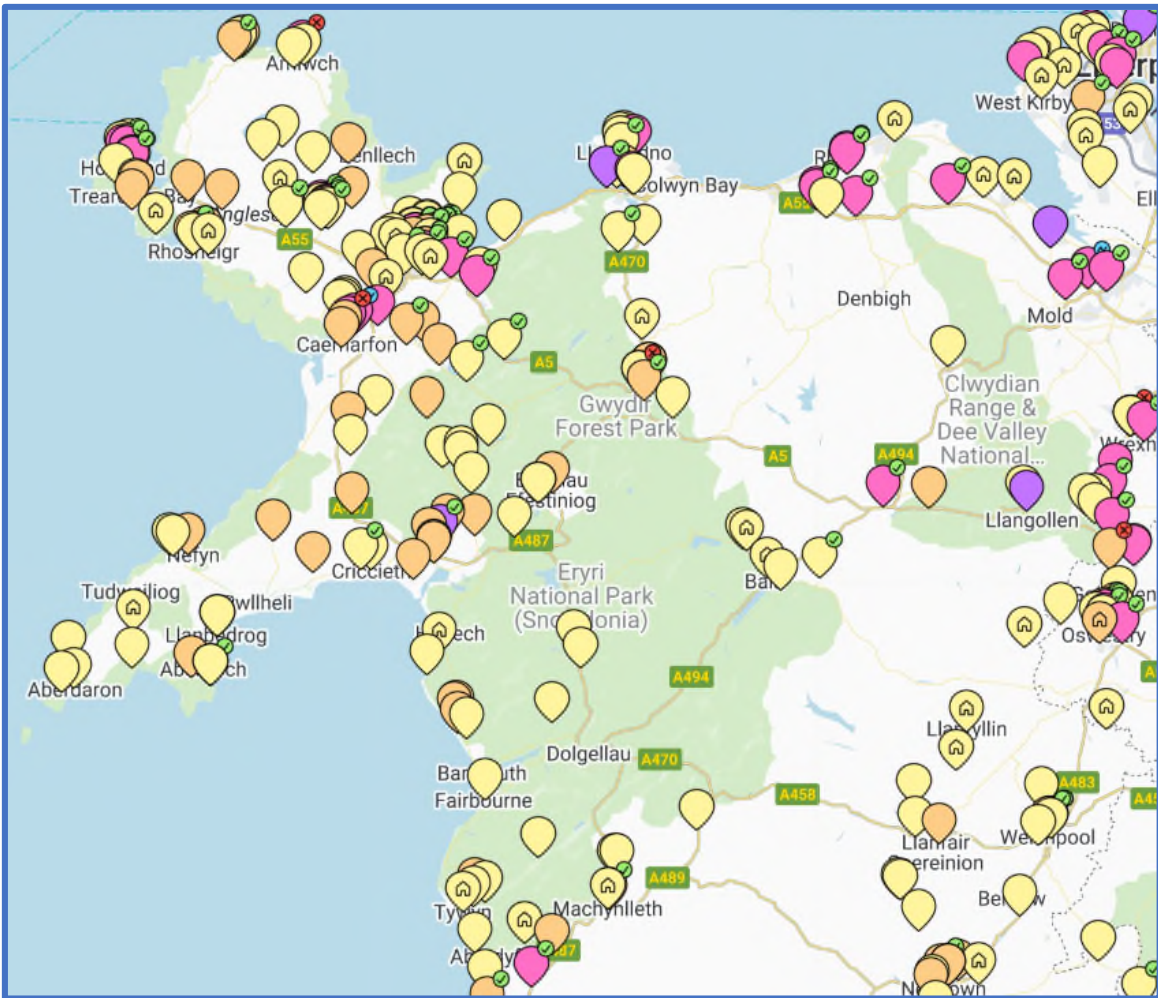
The number of plug-in vehicles is increasing across the UK, including in North Wales. This is likely due to an increase in environmental awareness, improved zero emission vehicle technology and improved understanding of electric vehicles. Table 4.2 summarises Government statistics<sup>11</sup> showing the number of plug-in vehicles, both privately and company owned, in each local authority area, with 7,106 such vehicles in North Wales.

| Fuel                             | Anglesey   | Conwy        | Denbigh-shire | Flintshire   | Gwynedd    | Wrexham      |
|----------------------------------|------------|--------------|---------------|--------------|------------|--------------|
| Battery Electric                 | 475        | 865          | 842           | 1,140        | 657        | 790          |
| Plug-in Hybrid electric (diesel) | 2          | 7            | 5             | 7            | 6          | 13           |
| Plug-in Hybrid electric (petrol) | 261        | 441          | 294           | 519          | 323        | 433          |
| Range Extended electric          | 7          | 12           | 19            | 16           | 13         | 13           |
|                                  |            |              |               |              |            |              |
| <b>Total</b>                     | <b>745</b> | <b>1,325</b> | <b>1,160</b>  | <b>1,628</b> | <b>999</b> | <b>1,249</b> |

**Table 4.2 - Plug-in Vehicles in North Wales**

There are a number of barriers to supporting the uptake of electric vehicles in North Wales. A network of charging infrastructure is required, and the roll-out of this is influenced by factors such as electrical supply capacity at sites, and the attractiveness of sites, particularly in rural areas, to private companies that supply and operate chargers. The current locations of EV chargers in our region are shown in Figure 4.4, taken from Zap Map.

<sup>11</sup> [Local area data: Electric vehicles and charging points \(parliament.uk\)](https://www.parliament.uk/data-and-statistics/electric-vehicles-and-charging-points)



**Figure 4.4 - EV Charger Locations**  
 ([Map of electric charging points for electric cars UK: Zapmap](#))

The uptake in EVs also requires the people of North Wales to be able, and choose to, use one. For many, the cost of EVs is currently prohibitively expensive.

### What this means for the RTP

The RTP needs to recognise the increasing use of plug-in vehicles in North Wales and seek opportunities to support further uptake. This could include car clubs and community transport.

### 4.6 Origin and Destination

Analysis of the origin, destination and purpose of trips made in North Wales is helpful to understand the reasons that people travel, and the movements that are made most frequently. Origin and destination (O-D) analysis is the study of where journeys start (their origin) and end (their destination).

Analysis of the origin and destination of journeys has been undertaken by Transport for Wales. This has been done using the North Wales Transport model, which separates the North Wales Region (and wider area) into different sectors.

The analysis considers the movements between and within sectors during a neutral weekday twelve-hour period (07:00 to 19:00). A trip to work from Prestatyn to Wrexham would have an origin

as Denbighshire Coast and a destination as Wrexham. The return journey would then count as a second trip with the origin as Wrexham and the destination being Denbighshire Coast.

A full breakdown of the O-D analysis and a map showing the sectors used for the model are shown in Appendix 2. The key findings from these figures are:

- By far the largest number of trips start and end within the same sector, suggesting there are a large number of shorter distance trips:
  - E.g. 151,921 within the Conwy Coast sector
  - E.g. 156,939 within the Wrexham sector
  - E.g. 98,466 within the Caernarfon/Bangor sector
- There are over 60,000 trips to Chester from North Wales per day, highlighting the importance of cross-border movements, particularly for the east of the region.
- There are 31,907 trips to the Liverpool City Region and Greater Manchester, further emphasising the importance of cross border movement.
- The three sectors in North Wales that attract the most trips are:
  - Wrexham (233,637)
  - Conwy Coast (211,095)
  - Deeside (185,729)
- Rural sector journeys are mainly within sector and/or to nearest coastal sector.

The Origin and Destination analysis has also considered the quantum of trips made by car and the distance of those trips. Table 4.3 considers all trips within North Wales in the morning peak hour (08:00 – 09:00).

| Distance     | Car Trips (vehicles/hr) | Percentage of trips |
|--------------|-------------------------|---------------------|
| 0 - 5 km     | 41,987                  | 26%                 |
| 5 - 15 km    | 66,101                  | 41%                 |
| 15 - 25 km   | 27,185                  | 17%                 |
| 25 - 50 km   | 19,166                  | 12%                 |
| 50 - 100 km  | 5,912                   | 4%                  |
| 100 - 250 km | 1,981                   | 1%                  |
| 250 - 500 km | 131                     | 0%                  |
| > 500 km     | 5                       | 0%                  |
| Total        | 162,467                 | 100%                |

**Table 4.3 - Distance of Car Trips in the Morning Peak Hour (all North Wales)**

As can be seen in the table, nearly 42,000 trips, or over a quarter of the trips made between 8am and 9am, are less than 5km in length. That is a distance of trip that could be made using active travel for many people.

Car use in morning peak hour to the three sectors that attract the most trips (Wrexham, Conwy Coast, and Deeside) is shown in Table 4.4. This shows that over 10,000 car trips per morning to just these three sectors are less than 5km each.





| Distance     | Wrexham   |            | Conwy Coast |            | Deeside   |            |
|--------------|-----------|------------|-------------|------------|-----------|------------|
|              | Car Trips | Percentage | Car Trips   | Percentage | Car Trips | Percentage |
| 0 - 5 km     | 4,564     | 30%        | 3,374       | 28%        | 2,879     | 24%        |
| 5 - 15 km    | 6,137     | 41%        | 5,246       | 43%        | 5,712     | 48%        |
| 15 - 25 km   | 2,438     | 16%        | 1,642       | 14%        | 2,125     | 18%        |
| 25 - 50 km   | 1,327     | 9%         | 1,180       | 10%        | 954       | 8%         |
| 50 - 100 km  | 490       | 3%         | 514         | 4%         | 248       | 2%         |
| 100 - 250 km | 109       | 1%         | 192         | 2%         | 65        | 1%         |
| 250 - 500 km | 9         | 0%         | 6           | 0%         | 11        | 0%         |
| > 500 km     | 0         | 0%         | 0           | 0%         | 0         | 0%         |
| Total        | 15,074    | 100%       | 12,154      | 100%       | 11,994    | 100%       |

**Table 4.4 - Distance of Car Trips in the Morning Peak Hour to three largest destination sectors**

The modelling work also considers the reason that people make trips, and this is shown in Table 4.5. This shows the importance of facilitating trips for shopping, commuting and leisure on our transport network. The table also shows the percentage of trips for each purpose that are made by car, demonstrating the dominance of car travel.

| Journey Purpose                              | Purpose Split | % of trips for |
|--|---------------|----------------|
| Work (commute)                               | 19%           | 82%            |
| Business (time/costs paid by employer)       | 6%            | 91%            |
| Education                                    | 7%            | 67%            |
| Shopping                                     | 30%           | 79%            |
| Recreation                                   | 17%           | 76%            |
| Holiday (day trip) if starting from home     | 5%            | 74%            |
| Holiday (day trip) if not starting from home |               | 87%            |
| Other (not starting from home)               | 16%           | 84%            |

**Table 4.5 - Purpose of Journeys in North Wales**



## What this means for the RTP

There are strong links between the communities and economies of Northwest England and Northeast Wales. This is reflected in the number of trips across the border each day seen in the modelling work.

It is vital that the proposals for improving our transport network are reflective of the journeys that people make. However, the RTP should also consider less common movements that may currently be too difficult or inconvenient to make regularly.

Through the RTP we should seek to reduce the number of shorter distance trips that are made by car. This could also include consideration of delivery of services in a way that reduces the need to travel to a specific location.

## 5. Review of Problems, Issues and Opportunities

Through the Regional Transport Plan we will be setting out how to work towards a more effective, more sustainable transport network in North Wales. This must be done in the context of transport improvements making changes that improve people's daily lives.

Where our transport network does not currently adequately serve the people of North Wales and that this is contributing to poor outcomes, including:

- limiting access to employment,
- Limiting access to learning
- ill health,
- negative environmental impacts (noise, pollution, air quality, road traffic accidents) and
- social exclusion.

### 5.1 Asset Management and Maintenance

Asset Management is the work done by the local authorities to maintain the physical transport assets which make up the transport networks for which they have direct responsibility. The local highway network includes roads, footways, cycleways, bridges, street lighting, traffic signals, bus stops, street furniture and signs. This does not include the Trunk Road network, which was shown in Figure 4.4, as those are the responsibility of Welsh Government and the North and Mid Wales Trunk Road Agent.

A network of well-maintained transport infrastructure is key to supporting travel around North Wales, both for private car journeys but also for bus services and active travel journeys. All bus journeys and a large proportion of active travel trips take place on the highway. Highway defects such as potholes can be a more significant hazard for cyclists than other highway users.

The severe funding pressures that local authorities are faced with is impacting on the ability of authorities to adequately maintain the existing asset, and this poses a risk to successful delivery of the objectives of the RTP.

#### What this means for the RTP

The RTP must acknowledge the importance of maintaining and improving the highway infrastructure.

### 5.2 The Economy

The economic profile and industrial mix of North Wales is diverse. It is home to a busy port at Holyhead, which brings freight and passenger traffic flows across the region. The predominant flow of road-based freight within the region is east-west, along the A55 from Holyhead in the west to the A494 and the English border. There are also freight movements south from the A55, through Wrexham and towards the Midlands.

The Freeport in Anglesey will support the continued growth of the freight, logistics and other associated industries in North Wales.

There are several industrial estates that act as major employment centres, including Deeside and Wrexham, where manufacturing dominates. Public transport and active travel options to these employment centres are sometimes inadequate and do not facilitate sustainable commuting. This is,



in part, due to how these places have been designed with private vehicles as the main mode of access.

The plans for an Investment Zone in Wrexham and Flintshire will support the continued growth of the advanced manufacturing and the creative & digital sectors in this area.

Agriculture remains an important part of the economy in rural areas, which are often less well served by public transport, and levels of car ownership are high. Many farmers have diversified their business to supplement their income, branching out to provide tourism and visitor services such as accommodation, cafes, farm shops and outdoor activities.

North Wales is home to several energy-related developments. Wind and solar farms and hydroelectric or tidal power stations are emerging as major contributors to the region's economy.

The public sector is a major employer, particularly in the north-west of the region. The Betsi Cadwaladr University Health Board alone employs 17,000 people. Higher and Further Education establishments include two universities - Bangor and Wrexham - as well as two large further education colleges, Grŵp Llandrillo Menai, and Coleg Cambria.

Tourism is a significant contributor to the economy of North Wales, but it also contributes to congestion at weekends and during seasonal peaks. The location of tourism sites and lack of public transport options to travel to and from these locations results in significant reliance on private car travel. Some major attractions also suffer from illegal and inconsiderate parking due to excess demand for limited facilities, impacting local communities.

The region has the lowest economic inactivity rates of all the regions of Wales and the highest rates of economic activity, at 19.8%<sup>12</sup> and 77.3%<sup>13</sup> respectively. Despite this, there are economic challenges, such as the impact of seasonal fluctuations in tourism and pockets of deprivation and poverty.

## What this means for the RTP

The RTP must include plans for supporting the growth of the economy in North Wales, ensuring that we are planning our transport system that provides local people with access to good quality jobs and learning opportunities. We also need to ensure that we are improving transport links that support the growth of the rural economy.

### 5.3 Cross Border Travel


North Wales is the region in Wales with the largest number of daily cross-border movements to and from England. Improving cross-border public transport services should be a priority for the RTP.

The north-east of the region has strong connections to north-west England, with a larger daily Wales-to-England flow than along the M4 corridor. Being adjacent to the border means this sub-region has different travel patterns in terms of destinations, with a lot more cross-border travel. 18% of journeys from the eastern sub-region are cross-border, with the north-west of England - Merseyside, Manchester and Warrington - as a destination accounting for 15% of all journeys.

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<sup>12</sup> [Economic inactivity rates \(excluding students\) by Welsh local area and year \(gov.wales\)](#)

<sup>13</sup> [Economic activity rate by Welsh local area and year \(gov.wales\)](#)



Chester's proximity is important as a gateway for North Wales and has strong links to the north-east Wales economy. Therefore, suitable transport infrastructure and services to Chester are an important consideration.

There is also significant movement of people and goods between North Wales and the Midlands of England. Wrexham's proximity to places such as Shrewsbury and Oswestry leads to cross-border movement for employment and leisure.

Economic factors, notably job opportunities close to the border, influence the commuting patterns between North Wales and England. Better bus and rail options will bring more job opportunities within people's reach, both for those in North Wales and in the north-west of England, by providing access to major employment centres on both sides of the border.

### **What this means for the RTP**

The RTP must consider supporting further partnership working with authorities in north-west England and set out proposals for improvements to public transport and active travel that facilitate sustainable cross-border commuting.

## **5.4 National Park**

Eryri is Wales' largest National Park, covering a total of 823 square miles. The National Park is home to over 26,000 people, and the Welsh language is part of the day-to-day fabric of the area. Nearly 4 million people visit Eryri every year to explore the landscape and discover its extensive recreation opportunities.

The National Park Authority and its partners including Cyngor Gwynedd, Conwy County Borough Council and Transport for Wales are undertaking a significant amount of work to reduce the environmental and social problems associated with car use and parking in the Eryri area. To date, this includes measures to manage parking and an improved public transport offer for visitors to the National Park. This includes the Sherpa'r Wyddfa bus service, a park and ride linked with parking management at Pen-y-pass, and the enforcement of parking restrictions on roads. Further work is required to encourage a higher proportion of trips to the park to use sustainable travel options, including further improvement to services and infrastructure, public education, and more attractive integration with rail services.

A review undertaken by Partneriaeth Yr Wyddfa in 2020 identified Llanberis, Betws-y-Coed, Beddgelert, and Bethesda as 'gateway villages' to the National Park.

The Sherpa'r Wyddfa bus services provide a way of travelling sustainably once visitors have arrived in the National Park. These services have been developed to meet visitor demand, operating within and surrounding the Eryri National Park. The Sherpa'r Wyddfa services have their own brand and website, with operation supported by promotional leaflets, bus stop flags and social media content. This approach has been successful in driving increased patronage on these services.

In its Programme for Government (2021-2026), Welsh Government set out its intention to designate a new National Park in Northeast Wales based on the existing Clwydian Range and Dee Valley Area of Outstanding Natural Beauty (AONB). This would be a fourth National Park for Wales, and the first new such park to be established in Wales since 1957.

## What this means for the RTP

The RTP should consider facilitating reducing car use and minimising the impact of visitor car parking in Eryri. It should also acknowledge the proposed changes to the Clwydian Range.

### 5.5 Visitor Economy

Section 5.4 covered the importance to the economy of visitors to Eryri and the success of the Sherpa'r Wyddfa services, but the visitor economy is important in many other areas of North Wales.

The region's attractions include beaches, large areas of caravan parks, outdoor pursuits and historically significant sites. The close proximity of these attractions to large urban centres of Northwest England means a large volume of visitors to North Wales from these areas.

Coastal locations such as Prestatyn, Rhyl, Towyn, and Llandudno contribute a huge part of the North Wales economy and visitors to these destinations are part of the continued success or regeneration of those places. This creates a significant demand for public transport journeys by tourists across North Wales. Even if people arrive at a destination by car, they should be able to access attractions by active travel or public transport.

Many visitor attractions would benefit from the opportunity to improve public transport and active travel access, allowing more people to access these locations, including people without access to a car. This might involve seasonal shuttle buses from town centres or rail stations, cycle and e-cycle hire or improving signposting for public transport and active travel information.

## What this means for the RTP


The RTP must include plans for supporting the growth of the visitor economy in North Wales, ensuring that we are planning a transport system that provides sustainable access to the many attractors across the region.

### 5.6 Rural Communities

North Wales is home to many sparsely populated, rural and semi-rural areas. Travel patterns and transport services that will work effectively and efficiently are different in rural areas from urban areas. Even in rural areas, there are people who do not have access to a vehicle.

Many rural areas have an older demographic profile, for example, Conwy and Anglesey have the second and third highest percentages of people aged 65 years in Wales (27.4% and 26.4% respectively), and the area with the highest percentage of people aged 90 years and over is Conwy (1.5%). While many older people may view their car as an aid to independence and mobility, there are also those who may no longer wish to (or be able to) drive. Buses are therefore a lifeline for accessing goods, services, healthcare and social settings for those living in rural areas, and particularly for those without access to rail services.

Rural areas of North Wales, generally further south than the coast and including Ynys Môn, have significantly fewer regular public transport services. Many journeys made are local and of a short length, with about a third being less than 5km and more than two thirds being less than 15km. Most of these journeys are within the same local authority area or to a neighbouring area. Many journeys that start in rural areas have destinations in nearby urban areas. While journey lengths are longer in rural areas, this still represents a significant number of short trips.



Existing public transport services typically operate at relatively low frequencies, both in urban and rural areas, and have limited hours of operation. For example, only 29% of the population of North Wales are within walking distance of an hourly public transport service after 7pm<sup>14</sup>.

Journey times by public transport are often uncompetitive with cars, particularly in locations remote from the coastline. Low frequencies are a barrier to people regularly using public transport and encourage car ownership and use.

For people in rural areas who wish to walk or cycle, rural roads present several challenges:

- they can be narrow,
- motor traffic speeds can be high, and
- they may lack a footway and a cycle track.

This can create a hostile environment for cyclists and pedestrians, meaning that people are less likely to choose to travel by active modes, even for relatively short journeys to the neighbouring village or nearest larger settlement that has services and onward travel connections.

There is potential for longer distance routes which have benefit for local people's day-to-day travel, and for the visitor economy for leisure. Increased availability of e-cycles, combined with high quality infrastructure, could be a significant enabler for such longer distance travel.

Even with better rural options and services, the private car will continue to be important in rural areas. This means that there is a need to help people make the switch to electric vehicles, including access to charging infrastructure.

## What this means for the RTP

It is vital that the RTP proposes improvements to active travel, passenger transport and other sustainable mobility options in the rural areas of North Wales. This will facilitate a shift to more sustainable modes that are often currently not considered viable for people in rural communities. The RTP should consider integrated, frequent and high-quality rural transport services, and include enhanced walking and cycling infrastructure connecting rural communities. However, it is vital that RTP acknowledges that a shift to public transport or active travel is not possible for many rural journeys and should consider how to facilitate the switch to Electric Vehicles for those in rural areas who are more dependent on private car use.

## 5.7 Freight

The Port of Holyhead is identified by Future Wales<sup>15</sup> as a Strategic Gateway for international connectivity. The creation of a Freeport site on Ynys Môn, one of two in Wales, will further enhance Holyhead's role as an international gateway. This will play an important role in strengthening the North Wales economy and creating jobs for local people, but there may be further implications of increased freight movements in North Wales.

The Port of Mostyn also generates freight traffic, with much of its business now dedicated to the offshore renewable energy sector.

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<sup>14</sup> [Travel to work, England and Wales - Office for National Statistics \(ons.gov.uk\)](https://ons.gov.uk)

<sup>15</sup> <https://www.gov.wales/future-wales-national-plan-2040>





There is a lot of potential for rail freight in decarbonising freight and logistics networks in North Wales, with capacity for a significant increase, in the volume of freight carried on the North Wales Main Line.

On the Borderlands Line, Padeswood Sidings creates a significant barrier to increased freight movement, as well as enhanced passenger services.

There is currently little provision for road freight operators seeking a switch to cleaner fuels for their vehicles operating in North Wales, notably charging stations and hydrogen re-fuelling stations.

For more local deliveries, including those to town centre businesses and those deliveries that have resulted from an increase in online retail, there is a local environmental impact caused by emissions from and size of delivery vehicles.

Measures to reduce the impact of local deliveries on communities, including e-cargo bikes, area delivery and servicing plans, micro-consolidation centres, and delivery lockers at key locations such as transport and/or mobility hubs.

## What this means for the RTP

The RTP should seek to support the success of Holyhead and Mostyn ports and facilitate their future growth but set out a plan for ensuring the impacts of good movements is minimised. It should consider the role of rail freight and also how to encourage hauliers to switch to cleaner fuels. The RTP should also identify measures for reducing the environmental impact of local deliveries.

## 5.8 Menai Crossings


The resilience of the Menai crossings is vital to the continued success of Holyhead as a port, and for connections to Ireland. It is also a significant issue for the people of Anglesey who require access to services including hospitals on the mainland.

Holyhead is a strategically important port in the United Kingdom due to its location and transportation connections and is a major gateway for transportation between the United Kingdom and Ireland. Freight accessing Holyhead is required to cross the Menai.

More locally, Anglesey's proximity to Gwynedd has fostered a close relationship between the two areas. Ynys Môn and Gwynedd share deep economic, social and cultural connections and are Welsh language strongholds. There are also, therefore, a large number of local trips that use the Menai crossings.

There are a number of issues that affect the crossings and impact on both local and port traffic. These include:

- **Resilience** - Actual and perceived resilience issues with the crossings have a negative impact on the attractiveness of Ynys Môn for economic investment. Britannia Bridge closures have more significant consequences than closures elsewhere on the strategic road network.
- **High winds** - Britannia Bridge is vulnerable to high winds. At some wind speeds Britannia Bridge is closed to high-sided vehicles and lower driving speeds are advised.
- **Collisions and incidents** - There are a high number of collisions on the Britannia Bridge. Such incidents can cause restrictions or closure of the bridge.
- **Traffic flow** - The volume of traffic can lead to delay and congestion, and hence long journey times, especially during the summer tourist season. Delays can affect emergency vehicle response times.

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- **Public transport** - The communities on Ynys Môn are not well served by the rail network. This limits the potential for travel across the Menai by rail for work, health and other services. Currently, bus journey times are uncompetitive with the car which limits the potential to achieve mode shift. Overall, public transport does not provide a good level of service for crossing the Menai Strait.
  - **Active travel.** There are many local journeys under 5km in length that are currently undertaken by car but could be suited to active travel if suitable routes were available.

Events and closures of the bridges have a significant impact on people's ability to cross the Menai Strait to access employment, education, health and other services, and they make it difficult for emergency services and businesses to operate. A closure will typically also lead to congestion on the surrounding road network approaching both bridges. This is exacerbated by the roundabouts on both sides of the A55 at Junction 9.

The importance of the resilience of the crossings meant that the issue was considered in detail by the North Wales Transport Commission. Their recommendations to address the issue are summarised in Figure 5.1.



Figure 5.1 - North Wales Transport Commission Recommendations for Improving Menai Crossing Resilience<sup>16</sup>


## What this means for the RTP

The RTP needs to consider options for improving the reliability and resilience of the Menai crossing, this should include improving the resilience of the road bridges and enhanced sustainable transport options.

## 5.9 Digital Connectivity

Digital Connectivity can play an important role in reducing the need for people in North Wales to travel, and also in supporting us to make sustainable travel choices.

<sup>16</sup> [North Wales Transport Commission Improving the Resilience of Connections Across the Menai Strait \(gov.wales\)](https://gov.wales/north-wales-transport-commission-improving-the-resilience-of-connections-across-the-menai-strait)



Better land use planning and improved digital connectivity will enable more people to work from home or to commute shorter distances to remote bases.

If we are to encourage more people to make sustainable choices for their journeys it is crucial that they have access to information such as public transport timetables and prices, and their walking and cycling options.

## 6. Roles, Responsibilities and Funding

### 6.1 Regional Collaboration and Strategic Planning

Four Corporate Joint Committees (CJCs) have been set up across Wales. Corporate Joint Committees have powers relating to economic well-being, strategic planning and the development of regional transport policies. The North Wales CJC is, therefore, responsible for setting out the strategic vision and developing the RTP.

The members of the CJC are the executive leaders of the 6 Constituent Councils:

- Conwy County Borough Council
- Denbighshire County Council
- Flintshire County Council
- Gwynedd Council
- Ynys Mon County Council
- Wrexham County Borough Council

An Eryri National Park Authority Member acts as a member of the CJC only in relation to the Strategic Development Plan Function.

Under the CJC a RTP sub-committee is directly responsible for overseeing the RTP. The sub-committee is supported by officers from the six local authorities, with additional support from Transport for Wales.

The CJC is also responsible for the development of the Strategic Development Plan for North Wales, providing the opportunity to ensure that strategic planning and transport planning are aligned.

The North Wales Metro proposals have been developed by Transport for Wales under the governance of the programme's Strategy Board. This work will help to shape the strategic vision for transport in North Wales. The other key influence in shaping the future of our transport will be the findings of the North Wales Transport Commission. Work is ongoing by Welsh Government to identify a governance process for progressing these two programmes and how they interact with the CJC and its sub-committee.

### 6.2 Rail


The operation of the Wales and Borders rail franchise in Wales is a Welsh Government responsibility, via Transport for Wales. However, infrastructure planning and the funding of Network Rail in Wales remains reserved to the UK Parliament.

None of the responsibility for rail therefore sits with the CJC or local authorities in North Wales. However, the RTP provides an opportunity to set out local aspirations for rail services within a wider transport context. Local authorities and Transport for Wales have a role in facilitating sustainable travel connections to stations to improve integration of the transport network.

### 6.3 Local Bus

The Bus Services (Wales) Bill gave powers to create Welsh Franchising Schemes where a local authority can give bus companies the right to run some or all of the bus services in an area.

Transport for Wales is assisting the Welsh Government with proposals to reshape the way bus services in Wales are governed through local franchising. Bus operators would provide services



under contract, on behalf of local authorities. This will give local councils greater control over bus timetables, routes and fares, ensuring that they better meet local needs.

Proposals to transform the bus service network across North Wales are being developed by Transport for Wales in partnership with local authorities.

## 6.4 Active Travel

Key duties under the Active Travel (Wales) Act 2013 are:

- for local authorities to produce maps of existing active travel routes and related facilities in their area and of the future and improved active travel routes and related facilities needed to create integrated networks for active travel
- requiring local authorities to have regard to those maps in preparing transport policies and to ensure that there are new and improved active travel routes and related facilities
- requiring the Welsh Ministers and local authorities to report on levels of active travel
- requiring the Welsh Ministers and local authorities, in carrying out certain functions under the Highways Act 1980, to take reasonable steps to enhance the provision made for walkers and cyclists and to have regard to the needs of walkers and cyclists in the exercise of certain other functions
- requiring the Welsh Ministers and local authorities to exercise their functions under this act so as to promote active travel journeys and secure new and improved active travel routes and related facilities

## 6.5 Responsibility of Local Authorities as the Highway Authorities

Local authorities are transport, highway, street-works and traffic authorities. This means that, along with the roles identified above, they have a responsibility for:

- highways construction
- highways maintenance
- maintenance of bridges and structures
- road safety
- public transport,
- community transport
- traffic management
- managing congestion
- coordination of utilities works

The local authorities also manage car parking in council run car parks and the enforcement of on-street parking restrictions at relevant locations. The authorities also work towards facilitating a shift to electric vehicles.

## 6.6 Funding

It is widely acknowledged that National policy for transport in Wales is ambitious, and there is a recognition that transport plays an important role delivering wider policies. However, pressures on both revenue and capital funding available to local authorities can make it difficult to deliver on those expectations.

The pressure to deliver towards these national transport priorities comes at a time when there is diminished resources across the public sector, to the extent that even fulfilment of basic operational requirements such as maintenance of the local road network can be difficult.

Delivering a step change in transport provision will require appropriate levels of funding.



Sources of funding that have traditionally been available for to local authorities to bid for include:

- Local Transport Fund (Welsh Government)
- Active Travel Fund (Welsh Government)
- Ultra Low Emissions Vehicles Transformation Fund (Welsh Government)
- Various now-ceased competitive bidding process from UK Government such as Levelling Up, Union Connectivity Development Fund, or Transforming Towns.
- Funding for Road Safety initiatives (Welsh Government)
- Resilient Roads Fund (Welsh Government)

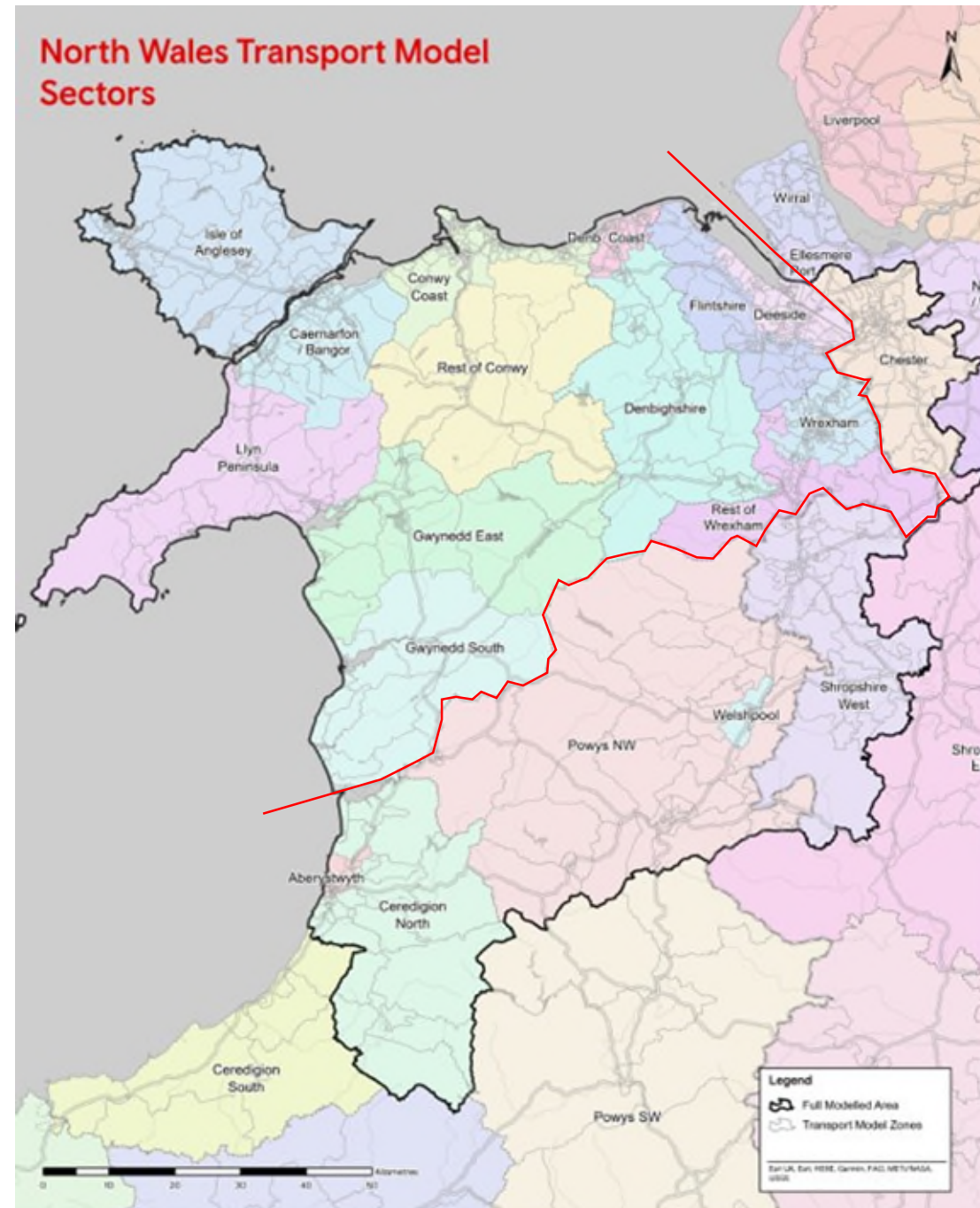




## Appendix 1: Welsh Government's Key Points for RTP Development

1. We DO want the RTPs to be firmly focused on achieving modal shift.
2. We DO NOT want overly long documents written solely by consultants.
3. We DO want evidence of clear outcome-focused thinking.
4. We DO want you to use innovative approaches and technology in both developing and implementing the RTP.
5. We DO want you to draw on existing analysis and plans, including the work of the Transport for Wales (TfW) Geospatial and Strategic Transport Analysis unit (G-STAT).
6. We DO want you to work together as a CJC to produce the RTP.
7. We DO want you to follow the five ways of working set out in the Well-being of Future Generations (Wales) Act 2015.
8. We DO want you to use creative ways to engage people to achieve modal shift.
9. We DO want you to include disincentives for car use as well as incentives for more sustainable travel.
10. We DO want the Strategic Development Plans and the RTPs to be developed together.

## Appendix 2 – North Wales Transport Model – Sectors and Origin and Destination Data



## Origin and Destination Data:

|                        | Llyn Peninsula | Gwynedd South | Gwynedd East | Isle of Anglesey | Caernarfon / Bangor | Conwy Coast | Denb. Coast | Rest of Conwy | Denbighshire | Flintshire | Deeside | Wrexham | Rural Wrexham | Chester | Rest of Wales | Manchester & Liverpool | Midlands | The North | South East | South West | North Ireland |
|------------------------|----------------|---------------|--------------|------------------|---------------------|-------------|-------------|---------------|--------------|------------|---------|---------|---------------|---------|---------------|------------------------|----------|-----------|------------|------------|---------------|
| Llyn Peninsula         | 28,626         | 751           | 4,411        | 943              | 9,108               | 476         | 87          | 242           | 114          | 49         | 63      | 77      | 22            | 86      | 51            | 491                    | 231      | 65        | 23         | 15         | 0             |
| Gwynedd South          | 682            | 11,623        | 1,665        | 12               | 158                 | 128         | 83          | 81            | 99           | 27         | 21      | 86      | 16            | 18      | 233           | 118                    | 526      | 23        | 20         | 9          | 0             |
| Gwynedd East           | 4,392          | 1,785         | 9,332        | 90               | 1,016               | 451         | 212         | 1,300         | 1,093        | 99         | 55      | 394     | 100           | 47      | 31            | 185                    | 370      | 22        | 29         | 11         | 0             |
| Isle of Anglesey       | 1,099          | 16            | 99           | 90,271           | 19,814              | 2,743       | 208         | 263           | 105          | 90         | 102     | 35      | 10            | 64      | 20            | 593                    | 361      | 83        | 120        | 17         | 28            |
| Caernarfon / Bangor    | 8,894          | 195           | 898          | 18,879           | 98,496              | 7,811       | 343         | 1,360         | 381          | 281        | 217     | 120     | 35            | 203     | 77            | 1,147                  | 512      | 234       | 112        | 50         | 1             |
| Conwy Coast            | 493            | 152           | 513          | 2,438            | 8,619               | 15,921      | 20,490      | 8,856         | 5,966        | 1,752      | 1,360   | 401     | 56            | 1,074   | 59            | 4,046                  | 717      | 415       | 66         | 15         | 1             |
| Denb. Coast            | 86             | 78            | 219          | 194              | 396                 | 21,123      | 75,270      | 1,258         | 9,968        | 6,118      | 3,383   | 320     | 37            | 937     | 25            | 3,467                  | 540      | 339       | 31         | 6          | 2             |
| Rest of Conwy          | 258            | 86            | 1,272        | 243              | 1,562               | 9,586       | 1,480       | 8,113         | 1,194        | 189        | 188     | 183     | 75            | 39      | 26            | 345                    | 391      | 55        | 28         | 10         | 0             |
| Denbighshire           | 123            | 126           | 1,273        | 80               | 427                 | 6,100       | 9,882       | 1,245         | 33,800       | 4,751      | 2,531   | 4,318   | 1,956         | 871     | 41            | 1,533                  | 1,186    | 99        | 21         | 9          | 0             |
| Flintshire             | 52             | 34            | 119          | 87               | 352                 | 2,115       | 6,954       | 233           | 5,192        | 36,816     | 34,757  | 9,881   | 770           | 12,173  | 23            | 3,805                  | 697      | 183       | 17         | 12         | 1             |
| Deeside                | 61             | 32            | 97           | 89               | 258                 | 1,782       | 4,152       | 253           | 2,965        | 35,503     | 89,660  | 7,144   | 491           | 34,420  | 24            | 8,188                  | 1,215    | 296       | 77         | 22         | 0             |
| Wrexham                | 99             | 105           | 453          | 28               | 146                 | 436         | 392         | 227           | 4,550        | 11,615     | 7,527   | 156,939 | 16,731        | 12,054  | 78            | 6,856                  | 11,059   | 500       | 51         | 48         | 1             |
| Rural Wrexham          | 26             | 20            | 110          | 6                | 37                  | 65          | 38          | 91            | 2,239        | 815        | 483     | 17,983  | 8,885         | 1,352   | 30            | 1,133                  | 8,183    | 68        | 109        | 20         | 0             |
| Chester                | 80             | 26            | 70           | 48               | 177                 | 1,014       | 908         | 40            | 878          | 12,351     | 34,732  | 15,020  | 1,512         | 126,963 | 68            | 60,839                 | 6,385    | 1,481     | 216        | 43         | 2             |
| Rest of Wales          | 38             | 244           | 31           | 15               | 49                  | 54          | 30          | 14            | 24           | 13         | 21      | 62      | 23            | 54      | 405           | 564                    | 732      | 205       | 23         | 15         | 36            |
| Manchester & Liverpool | 478            | 152           | 255          | 508              | 1,229               | 4,202       | 3,977       | 413           | 1,858        | 4,041      | 9,040   | 7,717   | 1,192         | 63,938  | 715           | 46,721                 | 8,453    | 1,496     | 714        | 221        | 124           |
| Midlands               | 274            | 605           | 447          | 256              | 466                 | 593         | 519         | 426           | 1,372        | 644        | 1,218   | 12,266  | 9,271         | 6,477   | 727           | 8,736                  | 159,515  | 704       | 685        | 234        | 96            |
| The North              | 73             | 30            | 29           | 73               | 225                 | 415         | 411         | 58            | 108          | 161        | 282     | 591     | 70            | 1,648   | 241           | 1,661                  | 603      | 0         | 0          | 0          | 66            |
| South East             | 36             | 19            | 29           | 107              | 118                 | 61          | 21          | 27            | 24           | 24         | 63      | 54      | 82            | 213     | 23            | 765                    | 627      | 0         | 0          | 0          | 201           |
| South West             | 10             | 11            | 10           | 16               | 50                  | 15          | 3           | 12            | 8            | 10         | 24      | 44      | 21            | 50      | 16            | 237                    | 249      | 0         | 0          | 0          | 47            |
| North Ireland          | 0              | 0             | 0            | 24               | 2                   | 3           | 1           | 0             | 0            | 1          | 1       | 3       | 0             | 2       | 23            | 67                     | 58       | 68        | 180        | 39         | 0             |