

Creating Cohesive
Communities
across the Cardiff
Capital region

Aerial view of the River Usk, Newport

Amey Consulting White Paper
February 2021

I returned to Wales from the Middle East, after having had the pleasure of working on various international projects for the last 20 years when I joined Amey Consulting in Wales.

Working at Amey is different. You're given the freedom to perform and it's refreshing to see the company's huge passion and support for the communities in which it works. Our presence across the UK makes us well placed to support regeneration and recovery from the pandemic.

We are more committed than ever to the principles set out in our Social Value Plan and to accelerate investment in the communities in which we operate, to both support their recovery from COVID-19 and, over the long term, realise their full economic and social potential.

The Creating Cohesive Communities research was funded by Amey Consulting to explore the issues and challenges of the 10 Local Authorities that sit within the Cardiff Capital Region. Partnering with Chambers Wales offered a platform where we connected with 68 local businesses to listen and digest the regional needs and to convey these into this report so that we can consider what efforts are needed for future regeneration and recovery.

Whilst this report focuses predominantly around the Cardiff Capital Region, many of the findings will apply across the UK's four nations and globally.

Our aim in Wales is to build partnerships with the ambition of improved engagement and collaboration where Amey operate, and our understanding of them. We hope you find this report valuable and that it inspires future ideas for the recovery ahead.

Caroline Lewis
Country Director Wales, Amey Consulting

Millennium Centre, Cardiff Bay

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Introduction

The Creating Cohesive Communities project is a joint initiative led by Caroline Lewis at Amey Consulting in Wales, Paul Slevin at Chambers Wales and Martin Lamb of Maple Consulting.

This research aims to understand the effect of the COVID-19 pandemic on businesses located in and around the Cardiff Capital region.



Aerial view of Cardiff Bay

The consultation process engaged and captured insights from various market sectors into the infrastructure challenges facing Wales and the priorities for recovery in a post-pandemic future. The aim is to develop a legacy to create a better 'new normal'.

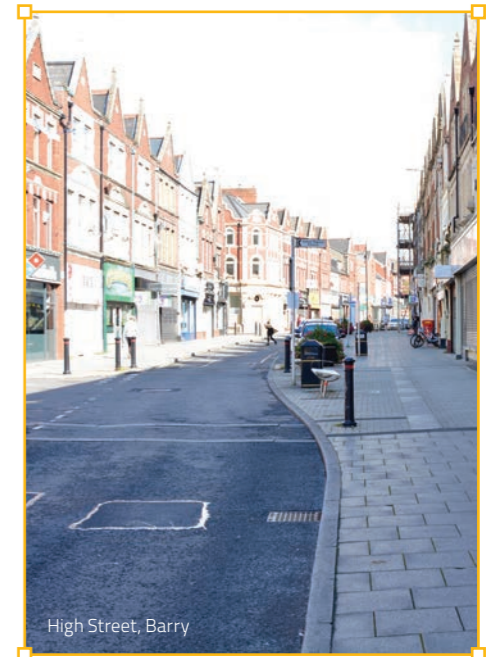
We aimed to capture the challenges affecting local businesses and their respective communities, focussing on a range of companies in size, sector and operations. We sought opinions from a diverse range of public / private sectors, and community groups on local challenges and issues that should be addressed to create more cohesive communities.

Whilst this report focuses on phase one, our aspirations are to continue with a second phase that will see further engagement in future stages to close key skill gaps across the Transportation and Infrastructure capability and identify an eco-system of partners for future alignment.

Stakeholder engagement

By the end of December 2020, the process had consulted with 68 organisations, through a series of digital roundtable events. This was supplemented by LinkedIn posts following each session outlining some of the key discussions held, an outline of the campaign and participants and a poll to promote wider engagement.

In total, 11 surveys were posted on LinkedIn which were viewed 10,754 times with 197 votes cast on the polls.



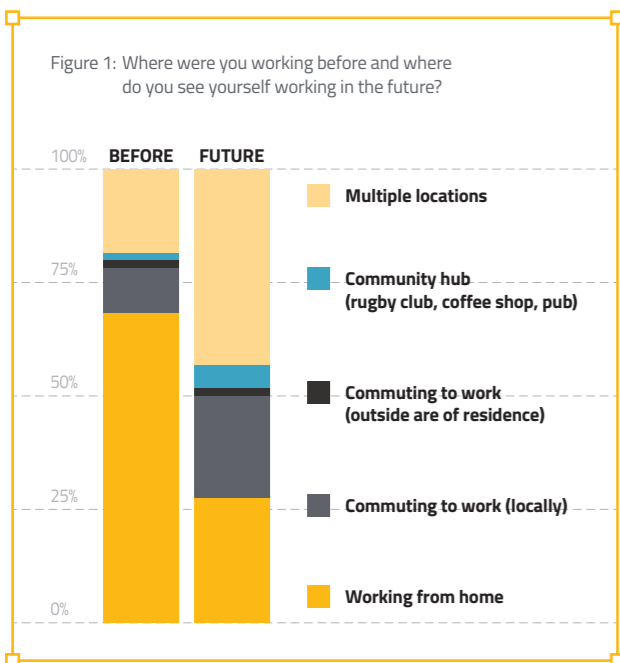
High Street, Barry

Key findings



Around 70% of people who responded were working from home during the time of the roundtables, with those who were not, generally working in the manufacturing sector.

Whilst a number of these discussions coincided with the Wales 'circuit breaker' lockdown, it remains largely representative of the current situation. Perhaps more illuminating is the possible 'post-COVID' working patterns, with potentially 30% still working at home, a significant increase on the 5-10% pre-COVID levels and over 40% working in multiple locations, likely to be the 'blended working' patterns discussed in the meetings with people splitting their time between home, a local hub and a central office.



This figure is backed up by online LinkedIn polls publicising the initiative; when asked 'how many days would you prefer to work from home?', no one answered 'no days', with the vast majority wanting to work from home either 1 – 2 days or 3 – 4 days per week. In a separate poll, people were asked about their preferred digital / physical working future, and again no one voted for it to be entirely physical. In both polls, the figure for those who would like to work from home full time and those who would like an all-digital working future was 6%. This reflects the importance given to general social interaction at least part of the time.

The figures are somewhat different from a global survey¹ of workers, which found that only 15% wanted to work from home full time after the pandemic, and that 49% had enjoyed homeworking less as time has passed. The same study also found that 45% of employees were missing collaboration and the same percentage missing the social aspect of work.

30% of people working from home and another 45% splitting their working patterns could have a profound effect on commuting patterns and the requirement for public transport provision.

There was general agreement that the 5 days per week office routine will be a thing of the past, except for critical staff, those who need to work there due to, for example, a lack of suitable space or faster broadband speeds, or those who choose to work there for social interaction. Except for factories / construction, there could be a blended approach to work for many with 1-2 days at home, 1-2 days at a hub and 1-2 days in the office.

The global study mentioned above also reported a 3-day office / 2-day home preferred working pattern, with a preference to be in the large corporate office when at work, rather than a hub. Some small businesses reported they had already given up office space whilst others have plans to reduce their floor plates or office size.

One logistics company, where staff need to be in the office to fill in customs declarations are in the process of procuring a larger office to deal with social distancing requirements.

It is recognised that there is a social aspect to offices that people enjoy, particularly younger people. A lack of this interaction can create loneliness and impact on mental health. Also, many younger people do not necessarily have the space to work efficiently or comfortably. It was commented that whilst many of the professionals on the calls might have home offices, or spaces in their houses to work, many younger people might live in a shared house and could be trying to work from their bedroom.

Further, it was discussed that there is a mentoring aspect that younger people require and the incidental learning that comes about from being in and around a work environment; indeed this was the joint top result from a LinkedIn poll asking what activities can't be replicated online.

1. computerweekly.com/news/252490546/employees-demand-office-redesign-for-new-hybrid-work-environment

Figure 2: How many days a week would you prefer to work from home? (34 votes)

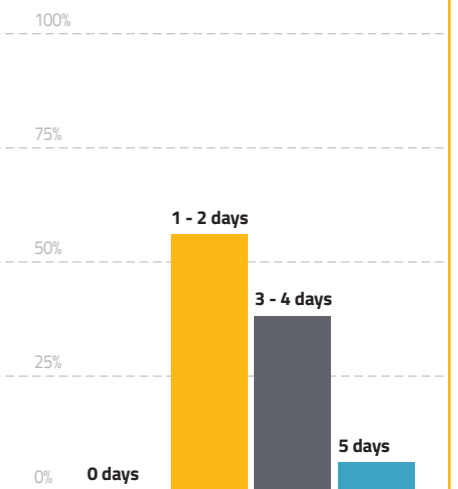


Figure 3: What would be your preferred blend of digital and physical working in the future? (18 votes)

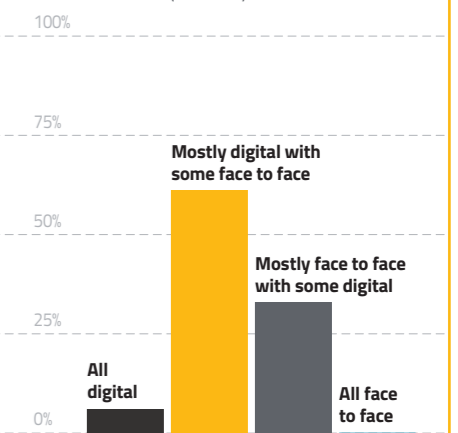


Figure 4: Which physical activities can't be replaced or replicated online? (12 votes)

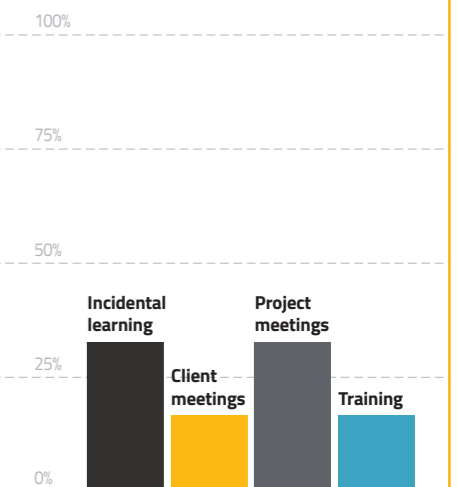




Figure 5: What is an acceptable commute time?

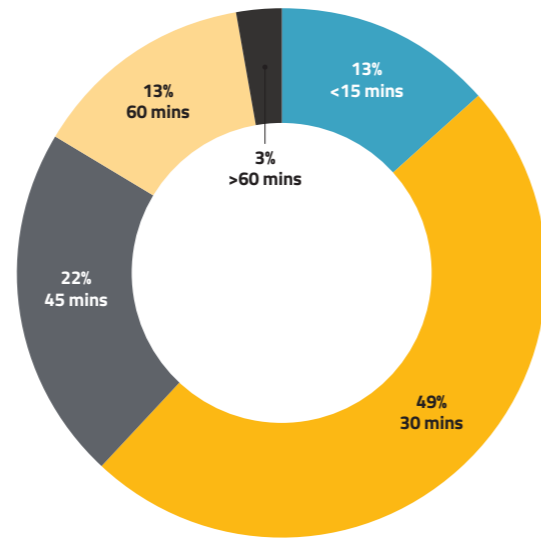
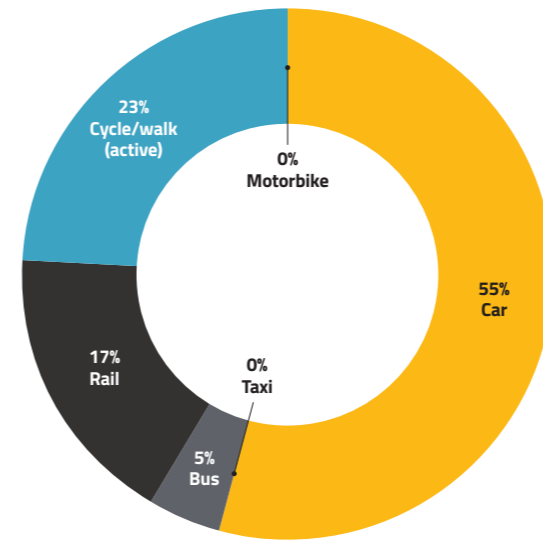


Figure 6: What is your preferred mode of transport?



There were various comments about how many people's commute had increased in time over the years, and the increased levels of productivity they have now achieved by working from home, or the added flexibility it has provided. Again, these gains will not be given up readily, further embedding the change to a 'new normal'.

Equally, a reduced commute time is preferred by many, with over 70% thinking that a commute time of up to 30 minutes was acceptable. This isn't surprising as there is a phenomenon called the Marchetti Constant², named after an Italian physicist who in 1994 described an idea that most people are prepared to travel about 30 minutes each way to work.

This has been the case from ancient Rome with a diameter of the city being a couple of miles where people walked and maintained through time until inventions such as the bicycle, train, streetcar, automobile and underground systems expanded the space that cities could take up and enabled them to grow. The average commute time in the UK was 29 minutes in 2018³, whilst in American metropolitan areas was 26 minutes.

This is not merely an academic curiosity; it has profound implications for urban life as the value of the land is governed by the speed at which transport can reach it. In relation to figure 5, this qualitative research broadly agrees with that emerging from central government which expects Public Transportation demand to be 70% of the present in 2023. However, this is based on current demand

and does not consider our ability to create new markets. This will be one of many priorities and challenges ahead.

DfT statistics for 2019³ indicate that across Wales, 80% of people commute by car; higher than both England and Scotland and joint highest with the West Midlands (the data is broken down into regions for England), although all areas outside London had figures of 70% or higher. The figure in Cardiff is 49%⁴, down from 57% in 2010 and reflects greater public transport choices and high levels of cycling in the city.

Half of the respondents to the roundtables stated that their preferred mode of transport was by car, followed by active travel (which we defined as walking, cycling, e-cycling or use of electric scooters or similar), rail and bus. It should be recognised that the people attending the round tables were largely, though not exclusively, from the Cardiff Capital Region and/or Cardiff itself, where there are good options for public transport.

Had the survey focussed on the more rural areas of Wales, it is likely that car use would be much higher. For those whose preferred mode was the car, it is possible that it is their only option as much as a personal preference. This could be because of a lack of suitable alternatives either at their origin (e.g. more rural areas) and/or destination, e.g. factories and manufacturing facilities are naturally out of town, and many out of town business parks are heavily car-centric locations.

Whilst the locations of factories may not lend themselves to public transport provision, business parks could be made more accessible by active travel and public travel provision.

In order to encourage people to use or return to using public transport, consideration will need to be given to reducing the friction of using it, for example through integrated, simple ticketing, excellent customer service, a pleasant environment on board and around the station and facilities such as fast and free WiFi to allow people to be productive or entertained.

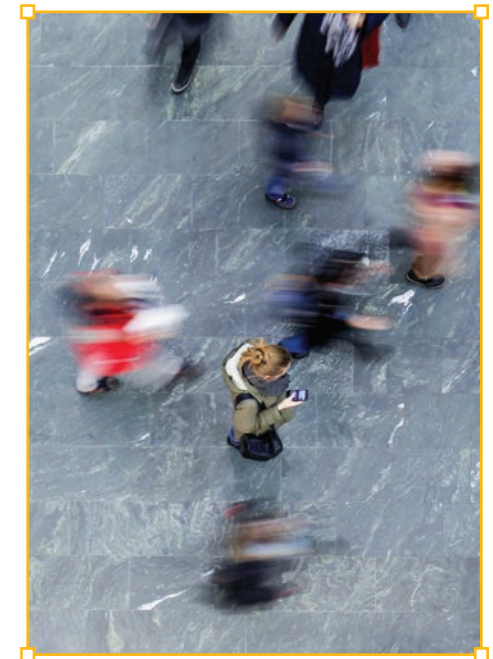
One participant from a semi-rural area pointed out that she couldn't justify the investment in time to travel to the office using public transport which was infrequent and would take well over an hour compared to using their car and the journey taking 25 minutes.

Clearly, good WiFi and a pleasant experience alone is not going to overcome that level of friction, however, if the journey time could be reduced and frequency of service increased through demand responsive and integrated transport, then a slightly longer journey time might be justified if the time spent was not 'dead' time.

It is questionable whether the large-scale out of town, car centric business parks constructed during the 1980s and 1990s would be permitted now; two of the seven pillars of the Wellbeing of Future Generations Act are 'a healthier Wales' and 'a Wales of Cohesive Communities'.

Further, many younger people now choose not to drive, and 'peak driving' may have occurred. In 1992-94, 48% of 17 to 20-year olds held a driving license, which dropped to 29% in 2014. In the 21 to 29 age-group, the number of license holders fell from 75 to 63% in the same period⁵.

Before the pandemic, it was reported⁶ that there was an emerging oversupply of business park space in the Thames Valley region, as younger people want to work in urban centres. Other articles^{7,8}, suggested that whilst such business parks might face the risk of becoming obsolete, those able to adapt by integrating green space, transport links and flexible space to attract start-ups and other companies may survive. One positive aspect of business parks compared to urban centres, was that they had greater flexibility to adapt.



2. bloomberg.com/news/features/2019-08-29/the-commuting-principle-that-shaped-urban-history
 3. assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/870647/tsgb-2019.pdf
 4. wales247.co.uk/2bn-transport-vision-for-cardiff-revealed
 5. driving.co.uk/news/britain-may-hit-peak-car-young-driver-numbers-fall-sharply

6. built-environment-networking.com/blog/2018/07/09/reading-bracknell-business-parks
 7. propertyweek.com/insight/the-return-of-business-parks/5101616.article
 8. savills.co.uk/blog/article/243072/commercial-property/why-business-parks-are-back-on-trend.aspx



With a change in potential working patterns, some companies might choose to significantly reduce their office estate in favour of homeworking. A hybrid solution could be to have staff coming to the office for specific events, homeworking and working in hubs close to their homes at other times, whether in a general co-working space or café or in dedicated spaces. Some of the larger employers such as Welsh Government, Admiral or British Gas could potentially have several small offices and meeting rooms dotted around the region.

There was interest in some groups about working from local hubs, although it was not on the radar of others. There were suggestions that hubs don't need to be specific 'business hubs' but could be cafes or community centres for example.

One organisation was considering providing a weekly allowance to its staff to work in such venues, thereby circulating money within communities and supporting SMEs. A caveat to this is that one of the reasons that business and coworking hubs such as Welsh ICE (Innovation Centre for Enterprise) are successful is because of the community within the centre, and the work undertaken to support this, plus business support, mentoring and training.

This would not be the case in a café, at least not in a formal sense. Equally, a business hub cannot be built and simply expected to work. Whilst many people enjoyed working in coffee shops before the pandemic, they are not designed as a full-time place of work, such as an office which has requirements regarding, for example, appropriate lighting, desk space and adjustable seating.

Railway stations could potentially be locations for community and work hubs, replacing lost rail revenue with revenue from workspace. The TfW Community Rail Partnership is undertaking a lot of work around station locations, with a focus on the community, for example in Pontypridd.

With good access to fibre cabling through the networks, this could be a key opportunity to improve broadband speed across local communities, whilst potentially fulfilling other functions such as supporting electric vehicle (EV) charging and providing on demand travel.



A new transport strategy

In November 2020, the Welsh Government released its draft strategy on the future of transport in Wales. This set out Welsh Government's ambitions for the next 20 years and priorities for the next 5 years.

The vision is for "an accessible, sustainable transport system" with 20-year ambitions that it would be good for people and communities, good for the environment, good for places and the economy and good for culture and language in Wales.

gov.wales/llwybr-newydd

Off peak working?

One of the companies on the roundtables had already moved to 'off-peak' working with no client meetings or calls before 10 am to allow staff to work at home and/or do the school run and travel in to work after the rush hour.

More widespread adoption of such practices could flatten the morning and afternoon rush hour and distribute travel demand more evenly.

TfW have already developed an app showing which trains are likely to be quieter – an important consideration whilst social distancing remains necessary.



Lloyd George Avenue, Cardiff

Infrastructure

Impacts

One finding was that those who work in manufacturing / logistics are finding their commute times are shorter and less delayed.

Whilst the road network might have been insufficient before, it might now be sufficient, so requiring relatively little investment. Small schemes such as bypasses are likely to be considered, whereas there may not be the requirement for larger schemes.

Recommendations

In line with draft Wales Transport Strategy, there is a desire to move people away from car use, so there will be little appetite for large scale road schemes:

- Existing infrastructure could be better used by staggering worktimes – so called off-peak working.
 - Small scale (e.g. bypass schemes for towns) road schemes likely to remain.
 - Origin-Destination data for transport categories in South Wales to explore opportunities for targeted infrastructure investment.
 - Reduction of silos in public transport and technology to improve journey time reliability.
 - Improve cross-valley connectivity through infrastructure schemes and/or public transport provision.
 - Roll out of broadband and 4G / 5G across valleys and rural communities, also in line with Wales Transport Strategy.
 - Consider extension to rail network using very light rail, bus rapid transit, on demand or other services to connect rural communities to frequent rail services.
- Active travel infrastructure within towns, including for freight for deliveries using e-vehicles. This is in line with Wales Transport Strategy.
 - Construction of attractive public realm around stations to encourage public transport use. Where railway stations are disconnected from the locations they serve, there is a need for placemaking and transport options for the first / last mile.
 - Charging infrastructure for electric vehicles, particularly in and around stations.
 - A missed opportunity to increase leisure travel across Wales.
 - Provide a single integrated platform for multi-modal travel and commerce options (single pane of glass).

Impacts

There could be fewer workers and less requirement for office space in cities. This raises the question of what to do with the offices and how this affects public realm? The rush hours will become less prevalent, or potentially will disappear as people come to the offices for specific meetings only, travel off peak for social distancing or come in for a morning or afternoon only.

One roundtable attendee worked for a company operating large estates and discussed the work they have done on putting buildings into a 'sleep' mode if unoccupied, changing the configuration from open plan to cubicles to promote social distancing and having food deliveries made through a single pane of glass.

They were also learning how to better manage buildings with limited people in to save money, e.g., through intelligent heating and lighting. Longer term, there may be the opportunity for conversion of some buildings to residential or other commercial uses.

In 2020 alone⁹, many large retailers including Arcadia Group, Debenhams, DW Sports, TM Lewin, Peacocks, Monsoon and Go Outdoors have gone into administration, with some bought as going concerns, some closing some stores, some moving to online only and some closing entirely.

Whilst the impact of COVID has undoubtedly played a role in this, it has likely only accelerated a process that would have happened anyway. Conversely, online shopping has surged during lockdown, again hastening a new balance of physical and digital presence.

There is a requirement for large warehouses (e.g. the Amazon distribution centres in Swansea and Bristol) to store the goods, and for vans and potentially in future, e-cargo bikes to deliver these goods. This can cause congestion in urban centres but could also open opportunities to monetise the kerbside.

Whilst there could be the potential to convert excess office or retail space for residential purposes in certain urban locations, there may also be an excess of car parking space as well, especially if people can be encouraged to use public transport for journeys to town and city centres.

Here too, there may be requirements for repurposing them, whether it could be as simple as turning part of a single storey car park to grass as a way of improving urban realm, or more radical solutions, such as demolition or conversion to other uses.

In the Netherlands, they developed the concept of TIILUP¹⁰ (Transport Infrastructure Integrated with Land Use Planning) in 2013 and have since developed the concept to Networking for Urban Vitality¹¹. Essentially, they are aiming to "develop a planning system that leads to higher social/ economic revenues, as well as reliability of the transport system and liveability/ sustainability in the regions involved".

These principles could be applied in the Cardiff Capital Region to both improve placemaking and to use public transport to increase land values and drive regeneration.

Recommendations

- Establish a network of hubs and community spaces to be created to enable working and networking close to home, in line with the Wales Transport Strategy.
- Engage community 'champions' or engagement managers for non-business hubs.
- Promote the benefits of localism.
- Embrace the opportunity to repurpose town centres.
- Examine potential for urban planning to deliver 10- or 20-minute towns and promote the benefits.
- Develop the opportunity to re-green urban areas to create new public realm where redundant buildings cannot be economically repurposed or where comprehensive redevelopment provides opportunity.
- Promote awareness of carbon reduction priorities at every level in town centre optioneering, i.e., construction, operation, demolition - whole-of -life
- Reuse of steel using blockchain [to enable traceability and reduce fraud], reduce downcycling of steel e.g., vehicles to reinforcing bars.
- Develop multi-use facilities to create multiple income streams, e.g., community centres / sports clubs / public transport hubs offering co-working by day, leisure facilities at night.
- Repurpose some urban offices / commercial space for residential use, e.g., on Cathedral Road in Cardiff, some large houses previously converted to offices are being reconverted for residential use due to the development of purpose-built office schemes in Cardiff City Centre. Convert some car-centric business parks to a mixed-use of office, residential and leisure, better integrated with public transport options.
- Revisit planning guidance predicated on car use, towards developments centred on public and active transport.
- A shift from the linear to the reuse / circular economy.
- Move procurement beyond Quality Price to include measurement to keep the Welsh Pound in Wales, source local, and support third sector.
- Encourage innovative private sector development and long-term investment.
- Move beyond carbon zero or neutral and aim for carbon positive to go beyond and help to address the carbon intensity and damaging impacts of past practices and lifestyles, by offsetting.
- Increase access to technology in valleys, as per Wales Transport Strategy of improving broadband to support home / remote working.
- Explore opportunities for tourist public transport, e.g., park and ride in National Parks, tourist train experiences on scenic routes, including e.g., meal or excursion.



9. business-live.co.uk/retail-consumer/list-shops-fallen-administration-2020-18177619

10. nuvit.eu/wp-content/uploads/2018/08/tilup-scoping-study_dec2013.pdf

11. cedr.eu/download/other_public_files/tra_2018/networking-for-urban-vitality-pactical-experiences-and-research-agenda.pdf

Public transport

Impacts

The business model for annual, 6 monthly or even monthly season ticket travel may no longer be viable. Even weekly tickets are likely to have lower take up.

Cities will remain important locations for sport, cultural and shopping visits. Taking public transport for such trips should be encouraged; effort needs to be made to make the experience on board the train and the public realm around stations to be pleasant.

There is a lack of connectivity across the valleys and other rural areas. Public transport provision in some areas is low (particularly for those without a railway station). There is the perennial issue of low public transport provision in rural areas making public transport unattractive, so keeping patronage low and in turn preventing the business case for increased frequency. In many cases, there genuinely isn't the demand for public transport, at least not in its current format.

The M4 relief road was cancelled in part due to affordability and in part due to the Welsh Government declaring a Climate Emergency.

The South East Wales Transport Commission, established to focus on transport options following the cancellation of the M4 relief road, presented its recommendations¹² to improve public transport connectivity around Cardiff and Newport, specifically creating a rail 'spine', with a trebling of the stations between Cardiff and Severn Tunnel junction from 3 to 9, comprising:

- Addressing the fact that the eastern half of Cardiff has no rail links, by building additional stations at Newport Road and Cardiff Parkway.
- Having stations in Newport West, Newport East to provide alternatives to road transport and Llanwern to support redevelopment of the site.
- A station serving Magor and Undy, to support their growth.

In addition, there would be enhanced cycling facilities and bus rapid transit to serve the stations. Crucially, the proposal will be for the transport to be integrated on with a 'One Region, One Network, One Ticket' strapline.

On one of the roundtable discussions an integration of services was suggested to help increased bus and rail patronage and their frequencies. Currently both modes of transport compete with each other are currently operate in silos.

The 2030 ban on the sale of diesel and petrol vehicles will rapidly increase the numbers of electric vehicles well in advance of that date. There will be a requirement for EV charging facilities, which are already being added in some public car parks. There could be a potential to increase these, and offer other facilities in car parks, although this would not tie in with encouraging public transport to urban areas.

EV facilities could be more useful at railway stations, although there is the issue of the spaces potentially being occupied for long periods, e.g. if the vehicle owner was in the office all day.

Recommendations

- Create attractive public realm around stations.
- Invest in stations (including their community facilities) and re-opening/improving branch lines.
- Deliver excellent customer experience to encourage users to (or back to) public transport. Clean, comfortable vehicles, good waiting facilities, easy navigation, courteous staff, high speed WiFi.
- Safety considerations for trains in line with aviation industry, bus/ car regulations i.e., no standing and social distance measures.
- Comfort considerations with seating and legroom and consider social distancing measures.
- Contactless payment for hygiene and convenience.
- On-platform communications displaying which carriages have spare seats, replicated on a Capacity Checker App.
- Allow bicycles on any vehicle – no booking needed and guaranteed room.
- Repurposing / constructing of hubs; these could potentially be around railway stations where they are close to town centres, allowing people to travel and hold meetings in the area.
- Extensions of rail links using light or very light rail to rural towns.
- Re-open closed lines using very light rail, guided or normal busses or for cycling.
- Develop cycle and walking friendly routes that are properly designed and put the active traveller first. Separation for cyclists, as they do not want to travel at walking speed.
- Invest in public transport provision and encourage use through road charging.
- Deliver demand responsive transport to link rural towns to rail network.
- Trial of hybrid passenger / freight services to decrease traffic and increase public transport frequency.
- Use of AI / machine learning to optimise routes and attract new passengers.
- Create infrastructure and facilities for first / last mile micro-mobility / active travel as part of the transport ticket. Provide active travel options at destination stations for last mile.
- Explore potential for trial of autonomous pods to deliver customers to rail / public transport hubs in suburban areas.
- Rethink season tickets for those not wanting 5 day / week travel, e.g., bulk buy tickets or Oyster style ticket with daily / weekly / monthly cap.
- Develop new business models for public transport and new types of public transport.
- Explore opportunities for tourist public transport, e.g. park and ride in National Parks, tourist train experiences on scenic routes, including e.g., meal or excursion.
- Create single pane of glass for public transport / hubs / active mobility / micro-mobility.
- East-West cross valley transport consideration.
- Any solutions need to consider carbon neutral solutions over their life and need to properly understand what passenger demands might be after the pandemic.
- Social distancing and related measures are likely to remain for the foreseeable future.
- Almost one year of lockdowns has changed behaviours. Staggered working patterns i.e., hours in the day / days of week are likely to remain as a permanent fixture particularly for the services sector. For retail and manufacturing these sectors are likely to remain the same.

12. gov.wales/sites/default/files/publications/2020-11/south-east-wales-transport-commission-final-recommendations.pdf

Electric vehicles to the rescue?

There was strong support for electric vehicles (EVs) as a sustainable choice of transport. Whilst the future is certainly electric for cars and light vans, EVs are not a panacea.

They do not help reduce congestion, they do not improve safety and they are not truly zero emission, as there are still particulate emissions though brake and tyre wear, and wider emissions from electricity generation (unless from renewables).

EVs should be encouraged and supporting infrastructure developed, but as part of a wider transport strategy, with active travel and public transport at its core.

Conflicting data?

50% of the roundtable participants expressed car as their preferred mode of transport, yet 80% of people in Wales commute by car. Whilst the study was focussed largely on the Cardiff Capital Region, it was not focussed solely on Cardiff, where car use is 49%.

Accepting that there are good rail links from the Cardiff hinterland to the city centre, a figure somewhere between 49% and 80% might have been expected, so there is a mismatch. Could it be that people prefer to walk or cycle, but only in good weather, or would use public transport if it were easier and more convenient to do so?



Aerial view of the Principality Stadium, Cardiff



Large events

It was recognised that large scale events, such as sports events and concerts in the various stadia and arenas in the region have specific challenges and will be the last parts of the economy to come back. Sporting fixtures have been played without spectators since March 2020, with Cardiff City Football Club (CCFC) and Glamorgan Cricket having had to make 25 and 22 staff redundant respectively. These were generally in ticket office, catering and operations. Many operational staff at CCFC were moved to the COVID test site set up in the stadium car park, otherwise more would have been lost.

Current guidance for Wales is that there must be 2m social distancing which equates to 8% capacity for CCFC, around 2,000 fans which is not viable. In England, the guidance is for 1m+, which would allow around 37% capacity and service season ticket holders. Revenue from conferences and events at the grounds has also been lost – a £1.5 million per year business for CCFC.

A high proportion of revenue for indoor venues, concert halls and theatres come from food and drink sales. The majority of staff from this sector have been made redundant and businesses have had limited support.

Historically, high volume of rail passenger numbers with crowding on weekdays and on weekends for largescale events will no longer be permitted due to social distancing requirements. TfW have reduced their

daily services to protect their staff and are running at 20% capacity, meaning even a 30 – 35% capacity at sports grounds would cause issues. TfW have supplemented trains with buses for Hereford College and could do the same for sports grounds too.

Such an approach has been trialed at Snowdonia National Park when they were forced to temporarily close the Pen-y-Pass car park for safety reasons due to car numbers and unauthorised parking, with buses bringing people in from Llanberis. They are now working with TfW to develop long term solutions, to protect the local environment and to manage tourism in a sustainable way.

It was reported that 90% of customers have retained their tickets for concerts and theatre venues and just want things to get back to normal, however what worked before will probably not work again, at least in the short term.

Potential solutions have included combined train, ticket and food and beverage tickets on one app with staggered train and stadium entry times as a way of managing crowds, temperature sensors, hand sanitisers and possible biosecurity virucides being sprayed.

It was pointed out that the effects are more widespread than just the sports clubs and arenas; large matches fill up hotels, pubs and restaurants and are a vital part of the local economy.

Conclusion



The restrictions on social gatherings and movement of people have radically altered the social and working practices of the public and what worked before might not work in the future.

The pandemic has shown us how adaptable we can be if forced to and has demonstrated what a change can be made. As the vaccination programme begins to pick up speed, there are hopes that restrictions will ease, and society can return to some sort of normality. Whilst there will be a strong desire to start to meet people in person again, there are some things that we would rather not see return; congestion, delays, packed trains and the daily commute.

This consultation has shown us that there is both a demand for social interaction and the convenience of working from home. The 5 days a week in the office routine may not return and this will have implications for the urban environment, for infrastructure and public transport. The future must now focus on getting the right blend of remote and physical working.

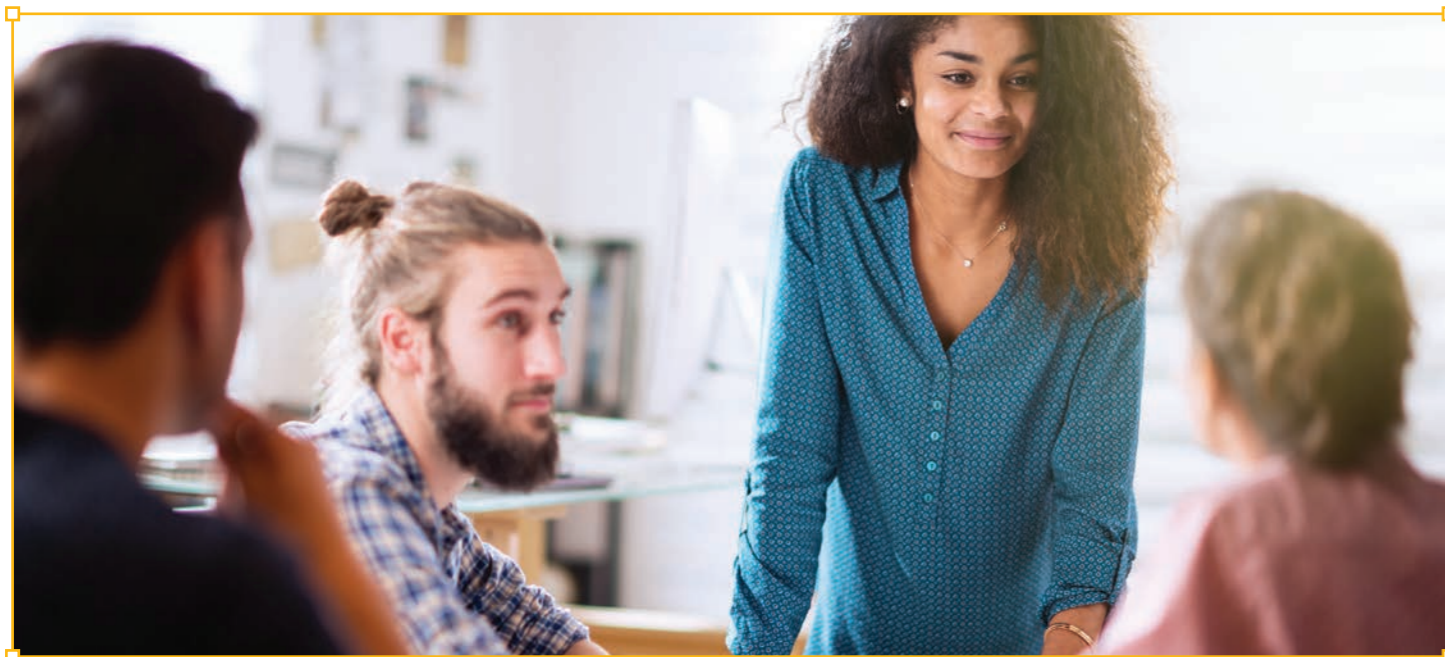
Moving forward, there is a need to define how innovation can help us work together. The findings have highlighted a need to change thinking away from linear economy towards circular economy and reuse to add value, save resources and be open to new business models. Automation, Intelligent buildings and smart infrastructure are becoming increasingly important and will inform the choices of tomorrow.

Just as at the start of 2020, no one could have predicted the upheaval caused by COVID-19 and at the start of 2021 we cannot predict the recovery. What is clear is that we have an opportunity to build back better though; to create vibrant towns, to create a low carbon, reliable public transport system, encourage active travel and flexible working arrangements. Amey remains committed and willing to play its part in this.

The Creating Cohesive Communities project team would like to thank everyone who has taken part in the roundtable discussions throughout October to December 2020.

We would also like to thank the public sector bodies who have provided advice and input which has helped to connect additional parties to join the conversation and highlight the priority and challenges across their organisations and regions.

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Caroline Lewis

Caroline Lewis is Amey Consulting's Country Director Wales.

An MBA qualified, internationally recognised B-2-B business professional with over 25 years of experience, she has experience of working across the Transportation, Infrastructure and Buildings market sectors for international civil engineering design consultancies and embraces a global perspective having worked extensively across the Middle East, Asia, Australia, Europe, UK, and the US.

Caroline's focus of expertise is building sustainable business operations, leading organic and strategic business growth and diversification strategies into new markets.

Her focus is on the implementation of Amey's social, economic, sustainability & environmental and wellbeing values within Amey's Welsh Hub and working with clients to ensure they are offered the right solutions against their priority and challenges.



Paul Slevin

Paul Slevin is President and Chair of Chambers Wales.

The Chamber plays a central role in the economy of Wales and has been instrumental in connecting this research project to the local business community.

Positioned as an active supporter to all businesses the Chamber has connected SME's, Third Sector organisations and public bodies and brought the business community together – without this critical network, this research project would not have been possible.

Paul has in-depth working knowledge directly with the UK and Welsh Governments and has brought strategic focus around policy and the needs of industry and the community.



Martin Lamb

Martin is a transport expert based in Wales with a deep understanding of transport policy and systems in Wales, the UK and Europe.

A recognised thought leader in his field, he has expertise in road, rail and light rail systems as well as new mobility concepts and technologies. From his work on European research programmes, projects and technology scans, he brings some of the latest transport thinking back to the UK.

He has a track record of project and programme management in a variety of fields, including high value European projects with multiple partners from different countries.

Martin is the Programme Manager for a European cross-modal research initiative and led the development of a European road and cross-modal research strategy.

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Aerial view of the
River Usk, Newport