



The Case for Change for the Regional Transport Plan for South West Wales



South West Wales Regional Transport Plan - Case for Change

INTRODUCTION

This case for change demonstrates why our regional transport plan (RTP) is essential for the ongoing development of our region. Our case for change is firmly led by opportunity; the opportunity to enable a growing and sustainable economy, the opportunity and need to ensure our transport system is sympathetic to the environment and the opportunity to ensure we can move around and beyond our region in the most effective way possible for all reasons.

The basis of the case for change is to ensure the RTP is a vehicle to ensure the delivery at the regional level of Llwybr Newydd, the Wales Transport Strategy, 2021. This requires the RTP to be developed to reflect national policy and the challenges and opportunities that face the region in developing a fit for purpose and robust transport network.

The transport network is at the heart of the region; it takes us to work, education, health care and leisure activities across the region and further afield.

THE AIM OF THE RTP

Llwybr Newydd has three overarching priorities the drive and inform the vision for the RTP. Within the three priorities the region has identified a small number of objectives that will enable Llwybr Newydd to be delivered regionally. The three priorities of Llwybr Newydd are reflected in the table below; these in turn lead to the RTP aims and objectives.

Table 1. RTP Aims and Objectives

AN ACCESSIBLE, SUSTAINABLE AND EFFICIENT TRANSPORT SYSTEM		
<p>Llwybr Newydd Priority 1</p> <p>Bring services to people in order to reduce the need to travel.</p>	<p>Llwybr Newydd Priority 2</p> <p>Allow people and goods to move easily from door to door by accessible, sustainable and efficient transport services and infrastructure.</p>	<p>Llwybr Newydd Priority 3</p> <p>Encourage people to make the change to more sustainable transport.</p>
REGIONAL TRANSPORT PLAN AIMS		
<p>To improve physical connectivity through enhancing active travel infrastructure to local services.</p>	<p>To achieve a shift away from private car use to more sustainable travel modes through service and infrastructure improvements.</p>	<p>To enable our residents to change their travel behaviour to use low-carbon, sustainable transport.</p>
REGIONAL TRANSPORT PLAN OBJECTIVES		
<p>To improve active travel infrastructure to local services in the first instance. Where this is not feasible enable residents to make sustainable travel choices.</p> <p>To have a transport system that supports the growth and development of sustainable economic activity in the region.</p>	<p>To have a transport system that recognises the hierarchy of travel modes identified in Llwybr Newydd, which is as follows:</p> <ol style="list-style-type: none"> 1. Walking and cycling (highest priority) 2. Public transport (rail, bus, community transport and taxis) 3. Ultra-low emission vehicles 4. Private motor vehicles (lowest priority). <p>To have a transport system that recognises the diverse communities of the region and their varying transport needs.</p>	<p>Make sustainable transport more available, attractive and affordable.</p> <p>To promote sustainable travel choice wherever possible.</p>

Developing a more effective, more sustainable transport network in the region is not an end in itself; it must make changes that improve people's daily lives.

We have identified that the current network does not adequately serve the people of the region and that this is contributing to poor outcomes, including limiting access to employment, ill health, negative environmental impacts (noise, pollution, air quality, road traffic accidents) and social exclusion. The efficiency of transport provision is a key determinant of how the region is perceived externally and the degree to which inwards investment in the economy can be maximised and our tourism offer developed. Affordability will need to be at the centre of the RTP to ensure access to transport is equitable.

The case for change is based on the premise of "decide and provide", we shall decide collaboratively the RTP vision and then set out how this will be provided. The framework provided by Llwybr Newydd, the Future Generations (Wales) Act, national climate change and environmental policies together with national and regional land use planning policy provides the key inputs into the vision which must be aligned with regional and local aims and objectives.

WHERE ARE WE NOW?

The transport network in the region comprises of some local routes for pedestrian and cyclists that provide access in villages, towns and cities to local destinations such as shops, schools, doctors surgeries and leisure activities.

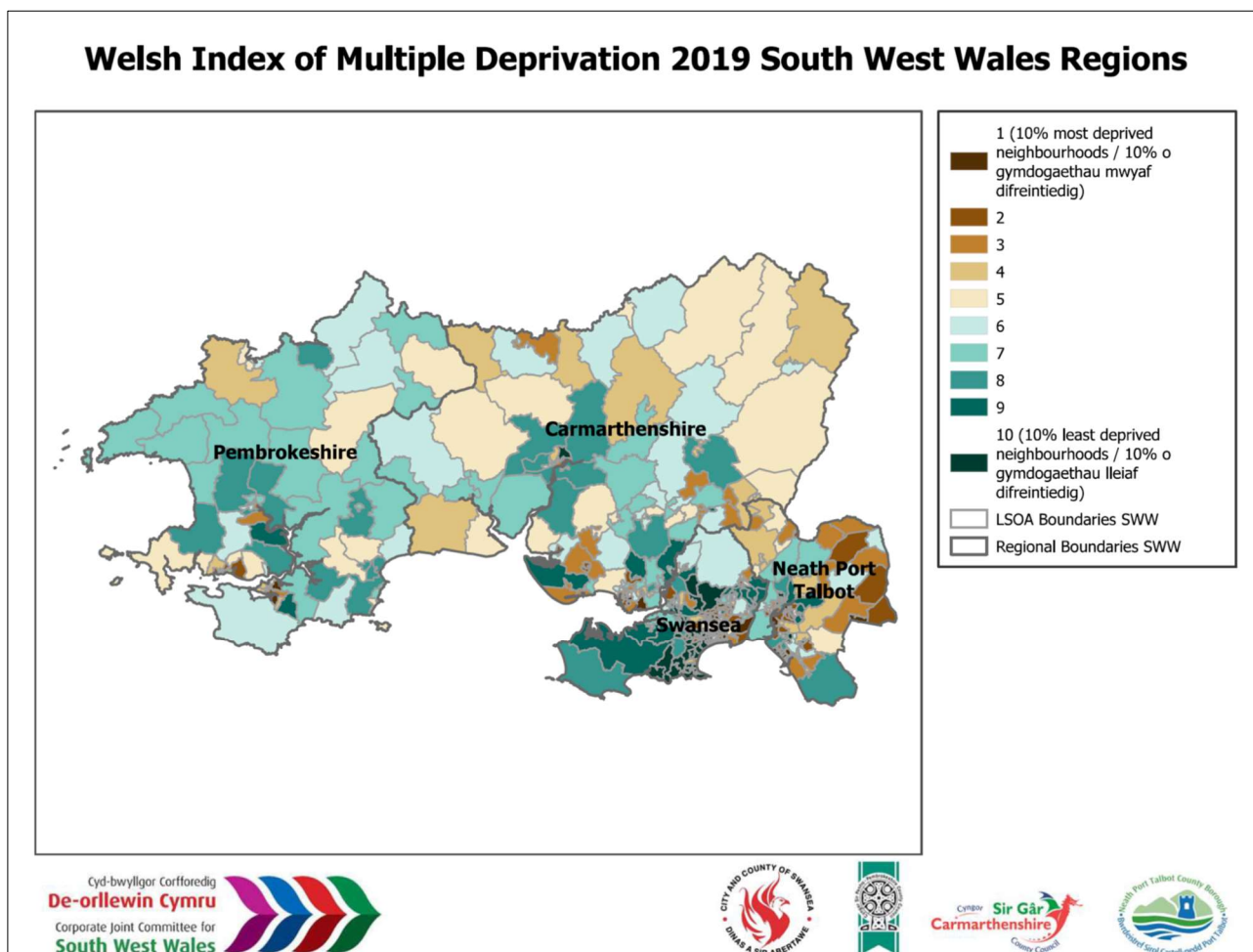
At the next level, a rail and bus system provide key linkages between main areas of population, but both have seen limited investment in the recent past. Subsidised bus services along with Demand Responsive (DRT) bus services have successfully covered rural areas in recent years, but this approach has known challenges with stable funding. The national Traws Cymru bus network provides long-distance links not made by the rail network and has seen deployment of zero-emission buses recently on the T1 Carmarthen to Aberystwyth route. Electrification of the rail line between Swansea and Cardiff has not been progressed leaving the services vulnerable to changes in the future provision of trains. Further west, issues with staffing, timetabling and implementation of new trains has meant that regular scheduled services to Pembrokeshire are often terminated at Carmarthen and a rail replacement bus utilised.

The concept of a South West Wales Metro system which provides an integrated public transport network with high quality interchange between modes is firmly established with detailed proposals under development to shape new investment in rail and bus. In many cases these proposals have strong business cases developed and are ready for early implementation.

The road network is extensive, covering the entire region. The network ranges from the main arteries of the M4/ A40 corridor and the A465 corridor to urban networks in the Swansea Bay area and the key towns together with local routes that provide essential access in rural areas. The 20mph speed limit on formerly 30 mph roads has been implemented across the region as mandated by Welsh Government.

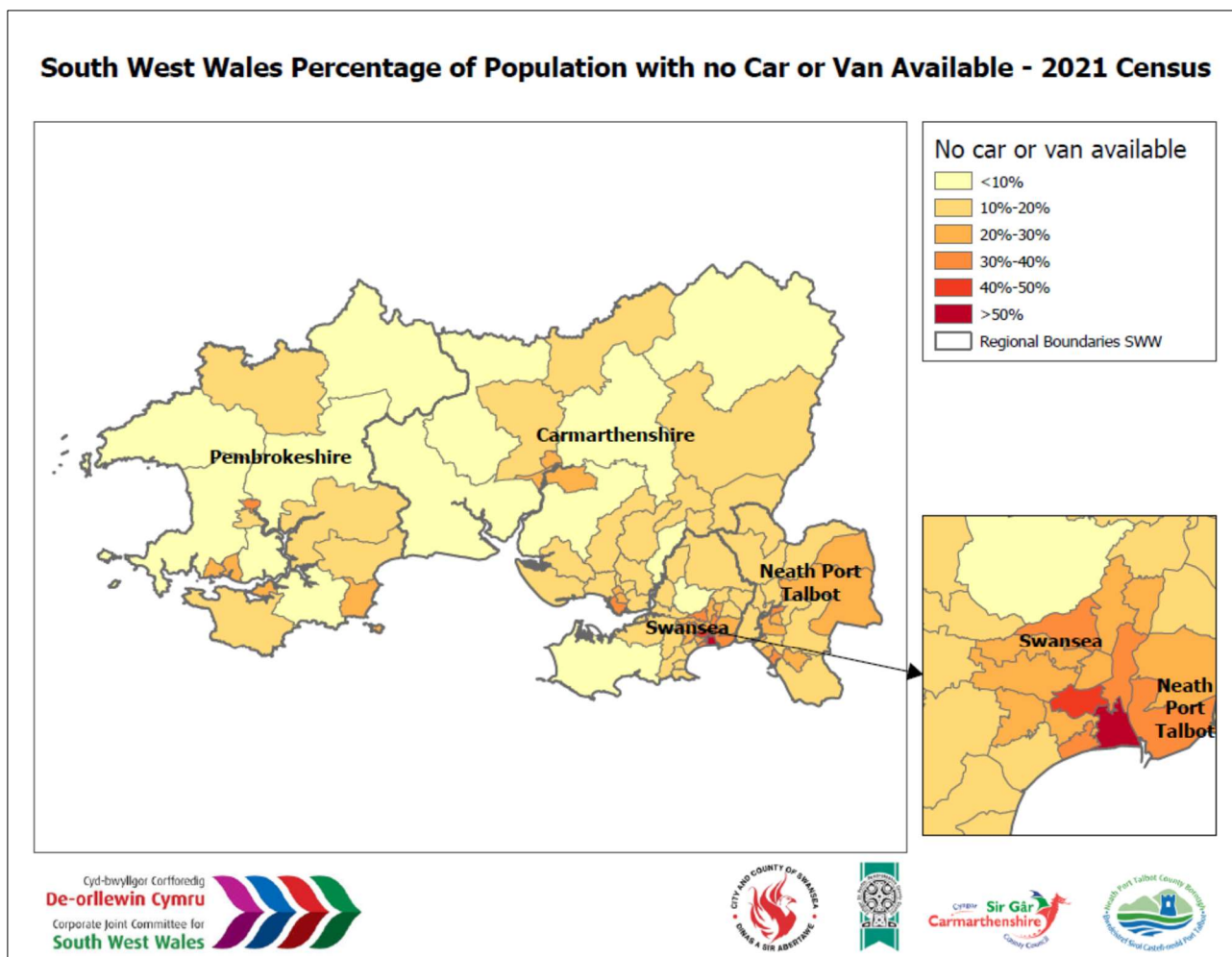
The region has demonstrable areas of deprivation, but a majority of households (81%) in the region have access to at least one car or van¹. This coupled with the current need for car use in many locations can lead to situations where car ownership is prioritised over other areas of household expenditure. There are some urban areas with high levels of deprivation and low car ownership which give rise to ‘transport poverty’. Transport poverty can also be mode specific with rural areas having limited access to effective public transport and cycling and walking opportunities.

Figure 1. Welsh IMD 2019



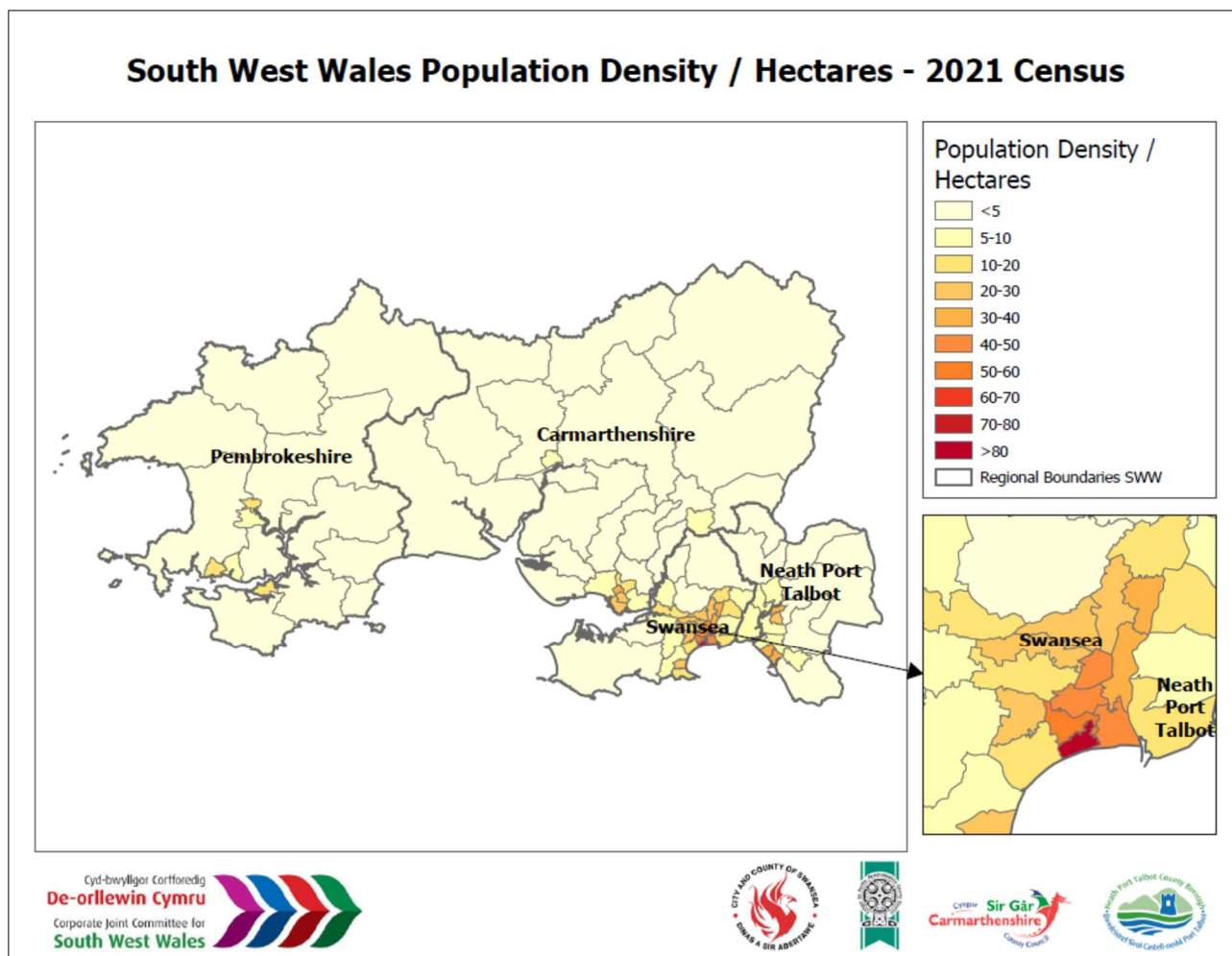
¹ 2021 Census data – Table TS045

Figure 2. Car or van availability in South West Wales – 2021 Census



The location and distribution of the population is an important driver of transport demand. Across the region population densities are low outside of the main urban areas. Equally, transport demand in rural areas is driven by concentration of jobs, education and facilities located in the range of larger communities, all of which will require transport for access.

Figure 3. Population Density in South West Wales – 2021 Census



The local GVA figures² (for 2021) reflect the region’s spatial portrait with service industries, public sector work and rural activities notable. The figures for Pembrokehire reflect the level of skilled jobs present in the two port areas and the energy sector.

- Pembrokehire £25,754
- Carmarthenshire £19,013
- Swansea £23,592
- NPT £17,713

The characteristics of the transport network reflects the strong role that car transport plays in the area. The use of a car is a necessity in many rural areas of the region and also for more complex urban journeys. The transport infrastructure reflects this reliance.

² Sourced from Statswales <https://statswales.gov.wales/Catalogue/Business-Economy-and-Labour-Market/Regional-Accounts/Gross-Value-Added-GDP/gvaperhead-by-area-year> GVA estimates the total output of an economy in this case a Council and per person specific figure has been given.

WHY IS CHANGE NEEDED?

The case for change is based on the need for the transport system as a whole to reflect changes in the demands placed upon it and also to ensure the transport system can deliver the movement and accessibility a changing region requires.

The population of the region is projected to increase. Whilst the increases are modest in percentage terms over the next 20 years the effect on the ability of the increased population to access work, education and community facilities will need to be improved to accommodate existing and future demands in a way that supports sustainable travel choices, economic activity and social inclusion across the region.

Table 2. South West Wales Population Projections (Welsh Government 2018)

	2023	2043	Change
South West Wales	915,005	946,815	3.5%
Pembrokeshire	126,580	130,196	2.9%
Carmarthenshire	190,022	197,218	3.8%
Swansea	250,004	264,840	5.9%
Neath Port Talbot	144,894	151,889	4.8%

THE ECONOMY

The economic profile and industrial mix of South West Wales is diverse. Also, overlaid with the general increase in population is a changing region where the economic opportunity created by the city deal investments will require a corresponding improvement in mobility.

The South West Wales Regional Economic Delivery Plan sets a clear path to economic prosperity. The starting point is one of structural, including infrastructure challenges. Recovery from covid19 has been excellent in some economic areas, less so in others. Transport has a significant effect on this variance and is a barrier to delivery of the economic goals for the region.

The region is home to the busy ports of Fishguard and Milford Haven, 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 A40 / M4 corridor with the A465 and A483 trunk roads providing further essential road links to the north and east. It is also home to UK's only current raw iron production site at Port Talbot that is planned to receive a £1.25 billion investment in green furnaces but also see major changes in working practices in the medium term. This reform will have major implications for the local economy and transport requirements; a formal notification of 2,800 job losses has been made in January 2024 with further but currently unquantified job losses expected in the local supply chain. This significant labour market change is likely to trigger notable transport consequences given the location of jobs across the region and in adjoining regions.

This industrial legacy is supported by development in the digital and education sectors with two universities and an active city deal across the region that prioritises the digital economy.

Tourism is a vital economic asset for the region. Pre-covid evidence up to 2019³ from Welsh Government indicated an annual value of £1.2 billion to the region representing circa 20% of all tourism activity in Wales.

The Swansea Bay City Deal is a nine project £1.3 billion investment in the region with central government, local government and private sector funding. As part of this there are nine key projects are underway to deliver a transformational change in work, education and skills. The projects are;

- Skills and Talent
- Digital Infrastructure
- Canolfan S4C Yr Egin
- Swansea City and Waterfront Digital District
- Homes as Power Stations
- Pembroke Dock Marine
- Life Sciences, Wellbeing and Sports Campuses
- Pentre Awel
- Supporting Innovation and Low Carbon Growth

The 9,000 new jobs that are planned within these projects will need to be accommodated on the region's transport system.

In parallel to the city deal, the Celtic Freeport provides a planned reinvention of the Milford Haven and Port Talbot areas with new diverse initiatives focused on renewable energy, with links to the tourism and digital economy sectors. The Freeport has replaced the Haven Waterway Enterprise Zone and the Port Talbot Waterfront Enterprise Zone, both of which were developed to provide economic stimulus.

The freeport is formed of 600ha of land that will be dedicated to the development of off-shore renewable infrastructure. The planned investment will reach £5.5 billion. The Freeport plans to develop 16,000 new jobs to create an employment hotspot in the area.

The creation of new jobs will require transport provision to meet new demand for movement given the effect will be to develop a green investment and innovation corridor stretching from Milford Haven to Port Talbot.

THE SOCIAL ECONOMY

The social fabric of the region is essential to the wellbeing and development of the area. A UK national asset critical to the wider UK transport system is the presence of the DVLA in Swansea with the associated 6,000 jobs.

³ <https://www.gov.wales/sites/default/files/statistics-and-research/2021-03/tourism-profile-south-west-wales-2017-2019-summary.pdf>

Access to education, healthcare, leisure facilities and shops all rely on transport to provide access. In reality much of the regional transport needs are met currently by car-based modes due to the wide range of journeys that need to be made. Across all communities a number of vulnerable and hard to reach groups will require specific consideration in the development of the RTP. The development of the RTP will have an ongoing workstream to develop assessments of the impacts for vulnerable and hard to reach groups

The region faces challenges that relate to transport provision and its affordability. These challenges include current instability in bus service funding and the effect of the cost of living crisis.

The social economy of the region reflects the diverse communities of the region with many interested parties working to deliver transport solutions; these include the NHS, businesses and local communities. All these organisations and groups have bespoke transport requirements, the levels of which and locations are continually evolving. The transport that supports this changing need and level of activity will need to be reflected in the RTP.

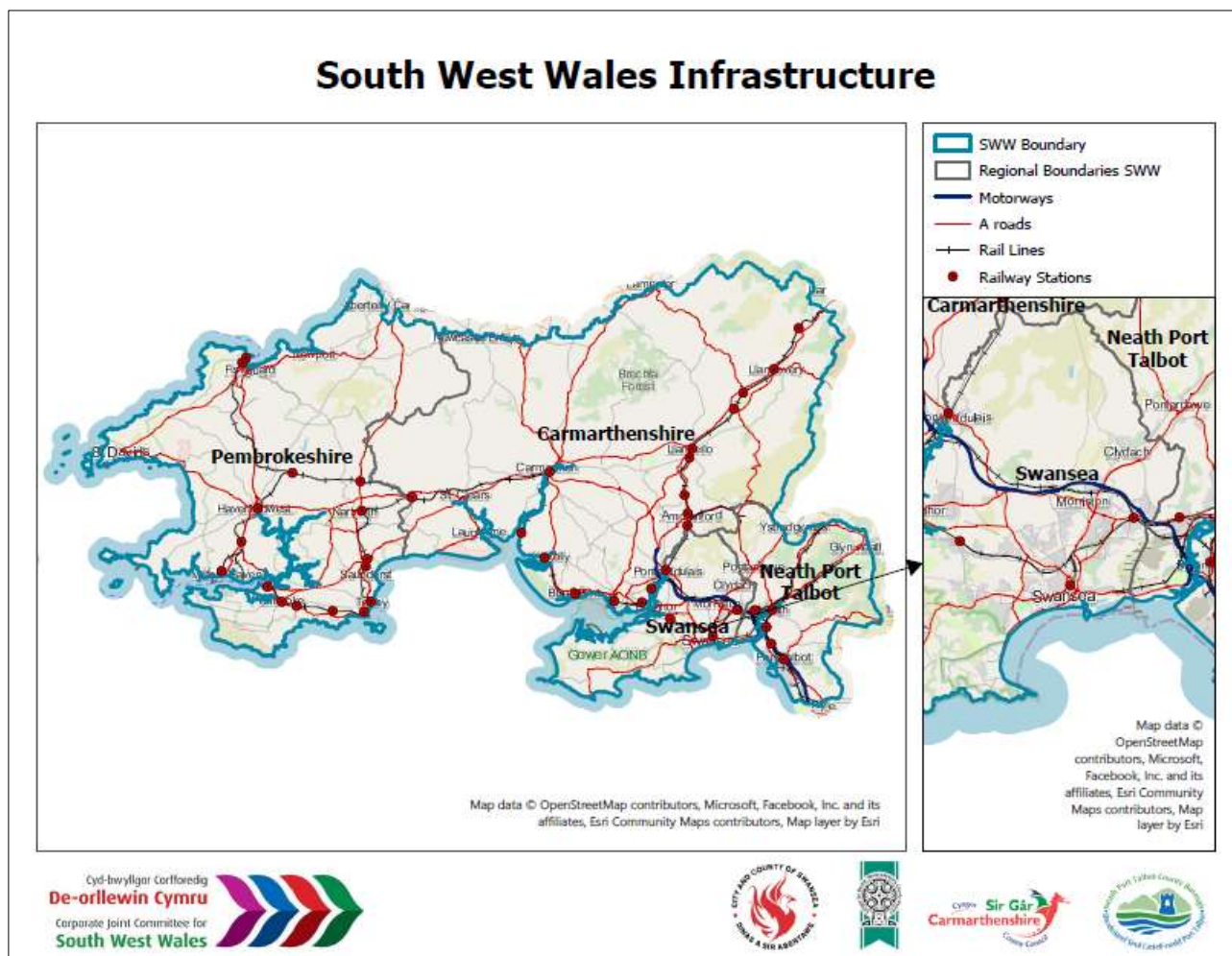
In particular education related transport faces particular delivery challenges of statutory and discretionary travel. The RTP will examine the accessibility to education to understand what policy levers are available to ensure a sustainable service is achievable.

A further 'social' element of the transport system in South West Wales is tourism, with its seasonal demands placing a particular burden on 'hotspots' in the summer months. The value of tourism to the area is noted in the economy section, above. Within that overall level of activity of the 23 million average day visitors to the region annually in 2017-19, of which 65% (15 million) used a car to access the region with 4.5% by rail. The predominance of road access and concentration into the summer months and specific locations creates a challenge that the RTP will need to consider.

THE TRANSPORT SYSTEM

The current transport system is predominantly road based. This is perhaps understandable given historic circumstances and approaches to transport planning followed in the past. Given the need to change how travel occurs and the need to manage the impact of transport the RTP follows the lead of Llwybr Newydd and is seeking make active travel and public transport valid alternatives to private transportation. This will require an evolving transport network with key investments being identified. To shape this a new RTP is essential to setting the policy framework and highlighting major investment proposals.

Figure 4. South West Wales – existing transport network 2024



Given the mixed urban and rural nature of the region, a series of solutions tailored to the varied socio-economic circumstances across the region are going to be required to be developed in the RTP.

The approach of developing a mode hierarchy that proactively pursues active travel and public transport choices wherever feasible is necessary for the region to meet its obligations on climate change and to ensure that economic development can occur without recourse to significant road changes. The RTP will need to identify the scope of this ambition and the detail of how it would be delivered and funded. Equally importantly, the RTP will need to consider at a strategic level how the existing road network and any additions necessary will be managed and maintained.

In addition to mode choice, the RTP has to set out our agenda and proposals for reducing the transport effects that cause climate change.

The transport system has a role to play in retaining economic activity within the region by making local journeys easy to achieve. The rail network currently, for example, indicates that local services are not used to their maximum and that the main passenger flows are to Cardiff and Eastwards.

Table 3. ORR Rail Journey Data 2021-22

Rank	Swansea	739,009	Neath	272,663
1	Cardiff Central	207,466	Swansea	83,271
2	Neath	83,271	Cardiff Central	60,592
3	London Paddington	80,699	Port Talbot Parkway	41,152
4	Llanelli	47,362	Bridgend	18,308
5	Port Talbot Parkway	43,135	London Paddington	18,051
6	Bridgend	31,684	Cardiff Bay	8,306
7	Carmarthen	23,797	Briton Ferry	2,981
8	Gowerton	18,357	Newport (South Wales)	2,525
9	Newport (South Wales)	15,991	Gowerton	2,405
10	Pembrey and Burry Port	12,042	Llanelli	2,353
	Other Destinations	563,804	Other Destinations	239,944

Rank	Carmarthen	128,301	Haverfordwest	42,533
1	Swansea	23,797	Cardiff Central	8,768
2	Cardiff Central	20,748	Carmarthen	5,573
3	Llanelli	11,139	Swansea	4,972
4	London Paddington	9,841	London Paddington	4,969
5	Whitland	6,391	Milford Haven	2,797
6	Haverfordwest	5,573	Whitland	1,162
7	Tenby	5,397	Newport (South Wales)	964
8	Ferryside	4,616	Clunderwen	947
9	Pembrey and Burry Port	3,793	Bristol Temple Meads	852
10	Milford Haven	2,881	Llanelli	769
	Other Destinations	94,176	Other Destinations	31,773

THE METRO

Maximum use is not made of the existing railway infrastructure with a number of freight only lines that could support investment to accommodate passenger services. The development of the rail elements of the South West Wales Metro provide a suitable framework to develop and seek funding for these proposals. Strong business cases have been developed for major investment in the rail elements of Metro. These include:

Rail

- SWW Mainline Rail Improvements
- Swansea Bay Metro Rail Improvements
- West Wales Parkway Improvements

Bus

- SWW Transport Hubs
- SWW RTPI Report

Active travel

- SWW Cycling Strategy
- SWW study into cycle hire, e-bikes and journey planning
- SWW propensity to active travel report

ULEV

- ULEV strategy for SWW
- EV Rapid Charging Hub Feasibility Studies
- EV Car Club Study
- EV Depot Study
- Depot Hydrogen Study

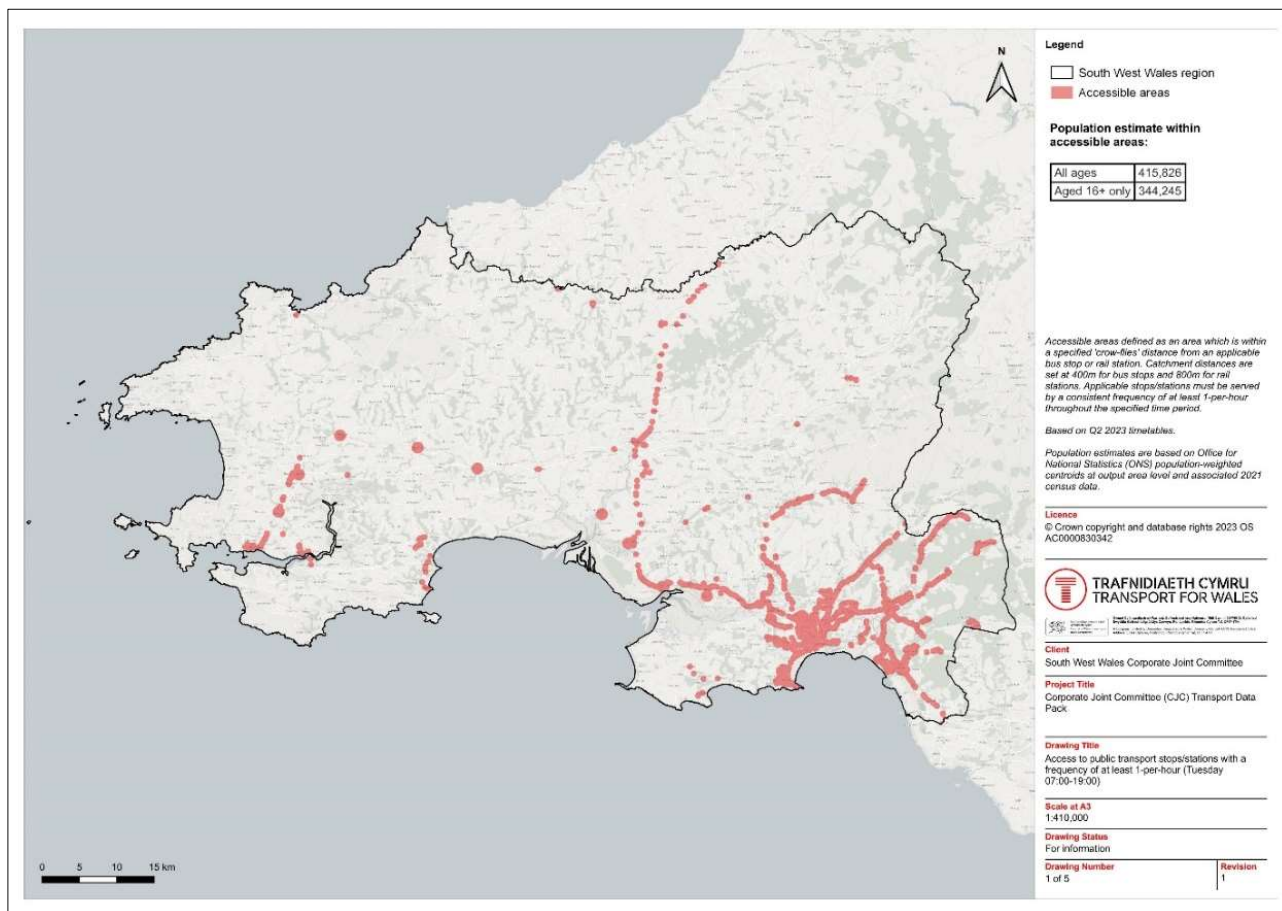
Development funding for the 2024/25 year has been secured to ensure that Metro is developed in alignment with the RTP delivery programme.

BUS AND METRO

We wish to see the Metro network concept of an integrated public transport network extended to bus, thus driving improvements in the network where rail links are not feasible. This will require changes to the current governance and funding approaches for bus.

At present access to traditional hourly bus services is limited to the urban areas and interurban connections. This creates challenges for making bus a mode of choice outside of these areas.

Figure 5. Current Bus Network – Access to an hourly weekday bus service (0700-1900)



The bus network will evolve through franchising undertaken by Tfw but with local input to define the network involved. This change on operational model presents a major opportunity for RTP to shape the network's outputs unlike the current approach of a network initially defined by commercial imperatives. An imperative is for the RTP to establish how, where and why interchange between travel modes can be enabled to allow the 'network' approach to be deliverable.

THE WELL-BEING OF FUTURE GENERATIONS

The Future Generation (Wales) Act sets out a clear framework for a developing Wales and how future generations are protected from the adverse effect of present-day decisions. The RTP will need to consider how this protection works in the transport context within the region. An integrated impact assessment will be conducted during the development of the RTP.

THE ENVIRONMENT AND GREENING THE TRANSPORT SYSTEM

The region is host to two national parks, Bannau Brycheiniog National Park (Brecon Beacons) and Pembrokeshire Coast National Park, both providing a unique landscape and environment that requires special protection. The region is also the host to the Gower Area of Outstanding Natural Beauty (AONB).

The transport ecosystem faces two main challenges (i) to enable access to the national parks and the AONB so their beauty and environment can be enjoyed and (ii) ensure that the effects of transport provision on the precious environment is minimised. This will require rethinking our approach to access and how transport interacts with the landscape across the national park areas. Also the same principles will be applied to our non-national park areas across the region as the region has an abundance of statutory environmental designations in place, for example, ANOBs SSSI's and SINCS.

There are seven AQMAs in force across the region. The AQMA designations are pollutant based and, traffic has played a key role in the need for some of these AQMAs. To help alleviate the traffic related issues, speed limits have been lowered on sections of the M4 to assist in meet air quality requirements. Unless efforts to decarbonise are embedded in the RTP, more such changes could be necessary but damaging to journey times. At the same time, the adverse impact on personal health of poor air quality is a key driver for change that the RTP will recognise in the development of solutions.

Table 4. South West Wales AQMAs

Council Area	Pollutant	Location	Main Reason
Carmarthenshire	NO2	Llandeilo	Traffic
	NO2	Llanelli	Traffic
	NO2	Carmarthen	Traffic
Neath Port Talbot	PM10 Particulates	Port Talbot	Steel Works
Pembrokeshire	NO2	Haverfordwest	Traffic
		Pembroke	Traffic
Swansea	NO2	Radial Routes	Traffic

The RTP will need to develop a new EV strategy including setting charging requirements and working with grid suppliers and DNOs to ensure power is available where needed. This will allow us to proactively transition to a zero carbon emission transport system. The RTP will identify the pace at which the region is currently moving to a zero-emission transport system and how this can be accelerated as ULEVs continues to evolve.

Llwybr Newydd and the Welsh national climate targets (which are more stringent than the UK wide equivalents) make a compelling case for seeking a revised transport system that secures investment to enable the necessary changes to occur. Strongly encouraging the use of active travel modes and public transport needs to be coupled to securing approaches to greening our vehicle fleet and securing the investment for electrification of rail.

RURAL NEED

South West Wales is home to many sparsely populated, rural and semi-rural areas, and we need to consider the travel needs of people living in those areas. Journey times by public transport are often uncompetitive with cars, particularly in locations away from the main inter-urban corridors. Low frequencies and the need to interchange are significant barriers in the current public transport system to people regularly using public transport and encourage car ownership and use.

Whilst few traditional bus services operate in rural areas DRT bus services have shown that low density populations can successfully be accessible by public transport if the funding and delivery structures are in place. Rural areas face particular challenges in having a stable supply of transport at an affordable cost. Lowering bus service investment, fuel poverty in rural areas coupled with wider rural poverty creates social exclusion and inequality that good quality transport can help overcome. The RTP will need to assess how this can be delivered and funded.

Southwest Wales retains a number of rural and 'town' railway stations but again service frequencies are low, car access is often required to the stations and access can be difficult for cyclists, walkers and public transport users.

SERVICING, FREIGHT AND THE PORTS

The movement of freight through the region is lifeline for the region's economy. It does however come with some challenges. Traffic to the ports passes through the region gives little benefit to the local community and economy en-route. The M4/A40/A465 corridors support these strategic movements. The jobs and activity created at the ports themselves are a cornerstone of the region's economy so change in how access the ports can be made as effective as possible whilst also capturing value for the community from these important facilities will be a key RTP theme.

The ports at Milford Haven, Port Talbot, Swansea and Fishguard are national assets with water-based access that give the region a unique and critical role.

Rail freight is limited beyond Margam Yard in NPT with flows to the Robeston Oil Plant and the Trostre Tinplate works still timetabled. The creation of new railway test track at Onllwyn on the region's border provides an opportunity for more trains and rail supply industry activity. The freight yard at Margam serves the Port Talbot steelworks and has rail links to other steel production facilities such as the West Midlands, Scunthorpe, Teesside and Dee Marsh on the Wirral.

Local deliveries create challenges in the urban context with high levels of “white van” activity. In rural areas large vans, delivering small items over large areas create specific challenges with efficiency of the delivery systems currently employed and the suitability of vehicles for rural roads.

The movement of HGVs through region creates a tension between local amenity and business requirements. Change will need to come in the form of effective routing, suitable facilities for HGV parking and locking into ways to decarbonise HGV use.

LAND USE PLANNING

The CJC will be responsible for strategic development planning, regional transport planning and promoting the economic well-being of the region. This brings a significant opportunity to fully integrate land use choices together with meeting development’s transport use.

The CJC has a lead role in cross-regional transport planning to ensure that our cross-boundary links are strengthened in the context of a developing and changing region.

As the regional planning approach will take time to fully develop, the RTP will need to be relevant to the current and any future local development plans.

Thus, the new RTP will assist in the making of sustainable development decisions and provide a framework to enable the regional tier of land use planning be transport enabled. The RTP will set out the transport policies for strategic candidate sites and opportunities for growth across the region.

THE RISK OF NOT CHANGING

The key risks of not changing will be seen in other areas of the region’s activity. Transport is a derived demand and the transport network responds to or pre-empt the needs placed upon it.

The dangers of not having a dynamic and forward looking RTP are that investment in transport across all modes stagnates and decisions in other area of the region’s evolution are taken without a robust and evidenced transport plan in place. At risk are the key goals of sustainable economic growth, an improved environment and a place people wish to live in, visit or simply enjoy.

DRAFT ENGAGEMENT PLAN

The basis of the draft engagement plan is to conduct a staged approach that has three central elements:

- i. A programme of awareness building across the widest possible range of stakeholders and interest groups. At this stage, the key message will relate to informing stakeholders of the RTPs importance to the region, encourage further technical and community engagement and to ensure that the greatest number of interested organisations and groups are reached. A series of briefing sessions are planned for March 2024 to conduct this outreach activity.

- ii. Technical consultation with the stakeholder and interest group communities. It is proposed to take this on a thematic basis to encourage debate about the RTP and its content among stakeholders with aligned interests. A central strand will be formal engagement within the constituent local authorities with disciplines that provide transport or rely on the transport network's outcomes. This engagement conducted across a range of channels is scheduled for April to September 2024.
- iii. On development a draft RTP document, a full, formal, public consultation in line with WG guidance and best practice will be held. To ensure that necessary impact assessments can be finalised and the learning from the consultation are fully included in the final approved RTP the public consultation is scheduled for the end of 2024. Again, a range of channels are expected to be deployed to reach communities not easily reached by traditional approaches. As a precursor to the main public consultation, it proposed to set up a series of small public sounding groups to meet during summer 2024 to provide an early view on the emerging RTP.

The stakeholder group lists are now being finalised to allow the stage (i) Stakeholder outreach to commence in March 2024.

GOVERNANCE

Successful delivery of infrastructure and transport services requires governance to be effective. The Llwybr Newydd, provides the basis for parties in the region to create better travel options. A key cross-boundary delivery mechanism is the CJC comprising the four local authorities and two National Park Authorities.

The CJC has been established and will drive the delivery of the RTP and the schemes to be funded through this, including the development of the South West Wales metro. The RTP will set out our agenda for change and develop the policies and solutions that are required.

CONCLUSION

The case for change sets out why the region's transport system must evolve and investment secured to deliver that change. The transport system has direct links to a wide eco-system of other policy areas that have common interest in a working and developing transport network for region. As the RTP is developed the commitment to ensure that stakeholder views and aspirations are recognised is an essential element of having a robust RTP in place. The RTP presents a unique opportunity to make the necessary connections to other regional policies, not least land-use planning which will be seen in the emerging Strategic Development Plan.