



Cydbwyllgor Corfforedig y Canolbarth; Mid
Wales Corporate Joint Committee

MID WALES REGIONAL TRANSPORT PLAN (RTP)

Case for Change





Cyd-Bwyllgor Corfforedig y Canolbarth; Mid Wales
Corporate Joint Committee

MID WALES REGIONAL TRANSPORT PLAN (RTP)

Case for Change

TYPE OF DOCUMENT (VERSION) PUBLIC

PROJECT NO. 70121415

OUR REF. NO. 03

DATE: MAY 2024

WSP

1 Capital Quarter

Tyndall Street

Cardiff

CF10 4BZ

Phone: +44 2920 769 200

WSP.com



QUALITY CONTROL

Issue/revision	First issue	Revision 1	Revision 2	Revision 3
Remarks				
Date	01/05/2024	08/05/2024	15/05/2024	
Prepared by	Rhys Richards	Rhys Richards	Rhys Richards	
Signature				
Checked by	Gemma Thomas	Gemma Thomas	Gemma Thomas	
Signature				
Authorised by	Michelle North-Jones	Michelle North-Jones	Michelle North-Jones	
Signature				
Project number	70121415	70121415	70121415	
Report number	01	02	03	
File reference				

CONTENTS

1	INTRODUCTION	1
2	THE CHALLENGES OF RURALITY	2
3	ECONOMIC CONNECTIVITY	5
4	KEY POPULATION CHARACTERISTICS	6
<hr/>		
4.1	POPULATION TRENDS	6
4.2	CAR OWNERSHIP	7
4.3	JOURNEYS TO WORK	9
4.4	COMMUTING PATTERNS	11
5	THE MID WALES TRANSPORT NETWORK	13
<hr/>		
5.1	THE HIGHWAY NETWORK	13
5.2	BUS SERVICES	14
5.3	FREIGHT CONNECTIVITY	15
5.4	THE RAIL NETWORK	16
5.5	THE ACTIVE TRAVEL NETWORK	18
6	PUBLIC TRANSPORT CHALLENGES	20
<hr/>		
6.1	PUBLIC TRANSPORT AVAILABILITY	20
6.2	TIMING OF SERVICES	22
6.3	NETWORK DELAY	28
6.4	PUBLIC TRANSPORT ACCESSIBILITY AND AFFORDABILITY	29
6.4.1	ACCESS TO PUBLIC TRANSPORT	29
6.4.2	PUBLIC TRANSPORT FACILITIES	31
6.5	DIGITAL CONNECTIVITY	32

6.6	AFFORDABILITY	32
7	ACCESS TO KEY SERVICES	34
7.1	INEQUALITY OF ACCESS	34
7.2	PUBLIC TRANSPORT JOURNEY TIMES	36
8	TOURISM	38
9	ENVIRONMENTAL CHALLENGES	40
9.1	TRANSPORT AND THE ENVIRONMENT	40
9.2	REDUCING CARBON EMISSIONS	40
9.3	LOW EMISSIONS VEHICLES	42
9.4	RESILIENCE OF TRANSPORT INFRASTRUCTURE	43
9.5	ROAD SAFETY AND HIGHWAY MAINTENANCE	44
10	CONCLUSION	47

TABLES

Table 4-1 - Population change in Mid Wales between 2011 and 2021 (Census data)	6
Table 4-2 - Population change by age group between 2011 and 2021	7
Table 4-3 : Highway connections to origin and destination commuter journeys	12
Table 5-1: Main bus operators in Mid Wales	15

FIGURES

Figure 1 - Deep rural communities in Wales (Rural Wales Observatory, 2009)	3
Figure 2: Proportion of households with 3 or more cars or vans (Census 2021)	8
Figure 3: Proportion of households with no cars or vans (Census 2021)	9
Figure 4: Census data 2021: Modal Split (Travel to work)	10
Figure 5: Percentage of the workforce who usually work remotely (2022-2023)	11

Figure 6: Mid Wales Strategic Highway Network	14
Figure 7: Mid Wales Rail Network	17
Figure 8: The Percentage of People Who Walk or Cycle at Least Once a Week, by rural and urban status	19
Figure 9: Public Transport Volume (Persons) 08:00am - 09:00am (2019)	21
Figure 10: Public Transport Volume (Persons) 17:00pm - 18:00pm (2019)	21
Figure 11: Last Public Transport Departure - Tuesday (Bus, Coach, Rail)	23
Figure 12: Last Public Transport Departure - Saturday (Bus, Coach, Rail)	25
Figure 13: Last public transport departure - Sunday (Bus, Coach, Rail)	27
Figure 14: Average delay on local road network (seconds per kilometre)	29
Figure 15: Percentage of people within walking distance of a sustainable modes of transport (active travel, bus, rail) – 2019 & 2023	30
Figure 16: Journeys to Rail Station by Mode	31
Figure 17: Share of railway station by step-free access*	32
Figure 18: WIMD 2019: Access to Services	35
Figure 19: Access to Key Towns/centres via Public Transport (TfW)	37
Figure 20: Total Domestic Transport Sector Greenhouse Gas Emissions (2012 -2021)	40
Figure 21: Greenhouse Gas Emissions by Domestic Transport Mode Over the Last Five Years	41
Figure 22: Number of Ultra-Low Emissions Vehicles (ULEVs) from 2013 to 2022	42
Figure 23: The number of publicly Available Charging Devices in Ceredigion and Powys (as of January 2024)	43
Figure 24: Percentage of Local Road Network at High or Medium Risk of Flooding (2023)	44
Figure 25: Percentage of local authority A roads in poor condition	46

1 INTRODUCTION

The development of the Case for Change is the first step in producing the Mid Wales Regional Transport Plan (RTP). The purpose of the Case for Change is to explain *‘why something needs to be done and what it should achieve’*.¹ It sets out a clear rationale for the Mid Wales RTP, as well as its aims and objectives.

This document focuses on evidencing ‘why something needs to be done’. It is considered important to fully understand the evidence-base and issues affecting the region, prior to the development of the RTP vision and objectives. The RTP objectives, which will set out ‘what it should achieve’, will be developed during the next stage of work.

This Case for Change has drawn upon the Wales Transport Strategy and key plans and strategies at the national, regional, and local level, as well as existing knowledge, to demonstrate the current transport situation and the key issues for transport and travel in the Mid Wales region. The issues identified will need to be targeted by the RTP, in order to address the priorities and ambitions of the Wales Transport Strategy.

A range of national and local data sources have informed the Case for Change. These include the Census 2021, Welsh Index of Multiple Deprivation (WIMD 2019) and datasets provided by Transport for Wales (TfW). The Welsh Government’s Regional Transport Plan Guidance² emphasises the need to link with Wales Transport Strategy Monitoring Measures and data from these measures is referenced throughout the Case for Change where relevant. This includes data from the Key Measures, which are *‘those considered most important in supporting Welsh Government’s overarching aims of mode shift and carbon reduction.’*³

The Case for Change has been informed by stakeholder engagement, which has included two RTP stakeholder workshops, as well as previous engagement exercises undertaken in Mid Wales, such as the Ceredigion and Powys Well-being Assessments.

¹ [Welsh Transport Appraisal Guidance \(WelTAG\) \(gov.wales\)](#), pp. 26

² [guidance-corporate-joint-committees-regional-transport-plans-version-2.docx \(live.com\)](#)

³ [Wales Transport Strategy Monitoring | Transport for Wales \(tfw.wales\)](#)

2 THE CHALLENGES OF RURALITY

The Mid Wales Regional Transport Plan covers the Mid Wales Corporate Joint Committee (CJC) area, namely the local authority areas of Ceredigion and Powys. These are primarily rural counties, accounting for 34% of the landmass of Wales and home to just 205,000 people.⁴ Both counties have low population densities, dispersed settlements and are heavily reliant on employment, services, and facilities within the larger towns in the region. Mid Wales is the least densely populated of the four regions in Wales, with around 30 people to each square kilometre. Mid Wales was the only region to experience a fall in population density between 2008 to 2018, at 1.2%⁵. The rural nature of Ceredigion and Powys is recognised in the respective Local Development Plans, acknowledging that rurality significantly affects economic, environmental, cultural, and social well-being.

In Mid Wales, key towns and centres are dispersed, with a considerable distance separating the largest urban areas in both Powys and Ceredigion. There are six main towns in Ceredigion – Aberaeron, Aberystwyth, Cardigan, Lampeter, Llandysul and Tregaron.⁶ Stakeholder engagement has highlighted that in Powys, there are plans for increasing the focus of service delivery through hubs and localities, with the main towns identified as Brecon, Llandrindod, Newtown and Welshpool. Such factors highlight the importance of linking the RTP to future proposals for land-use planning and service delivery.

The main towns in the region are important service centres for the surrounding communities. Essential services and amenities such as areas of employment, hospitals, GPs, food stores and primary and secondary schools can be found within the larger urban areas throughout the region. The ability of communities to access these services is important in protecting and enhancing the mental and physical well-being of those who live in Mid Wales.

A further factor in terms of access to services is that residents within Mid Wales are often required to travel out of the area to access key facilities, such as hospitals and education. For example, those within Powys are required to travel to other parts of Wales and across the border to England for hospital appointments. Similarly, residents in Ceredigion often have to travel to hospital appointments in Carmarthen or Swansea.

Some of the communities in the Mid Wales region can also be described as ‘deep rural’. This has been defined in a previous study as:

- Communities located at least 30 minutes drive-time from a centre with a population of more than 10,000;
- Communities comprising between 180-500 households; and
- Communities with fewer than five of twelve ‘key’ services.⁷

⁴ A Vision for Growing Mid Wales – Strategic Economic Plan & Growth Deal Roadmap, May 2020

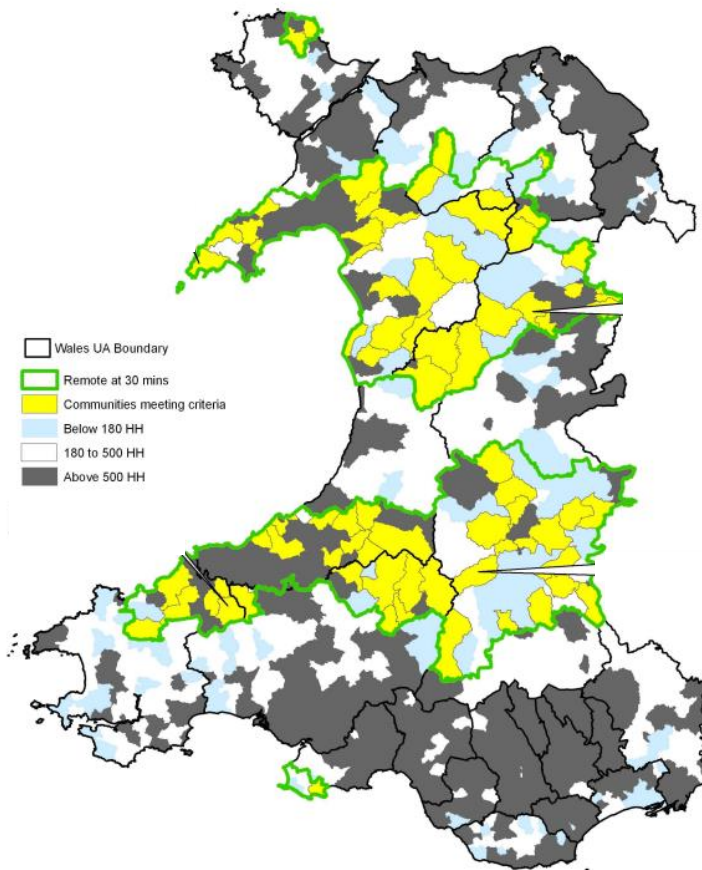
⁵ Welsh Index of Multiple Deprivation – Stats Wales (2019)

⁶ [Microsoft Word - 001 LDP Vol 1 Final English \(ceredigion.gov.uk\)](https://www.ceredigion.gov.uk/microsoft-word-001-ldp-vol-1-final-english)

⁷ Deep Rural Localities, Wales Rural Observatory (October 2009)

Figure 1 shows the communities in Wales that met the ‘deep rural’ criteria at the time of the study, with many of the communities located within the Mid Wales region. These communities are likely to have specific challenges relating to, e.g. their populations and migration patterns, well-being needs, provision of local services and employment.

Figure 1 – ‘Deep rural’ communities in Wales (Wales Rural Observatory, 2009)⁸



This Case for Change reflects the rural nature of Mid Wales and the distinctive transport challenges of a rural area. These rural challenges are highlighted by ‘A Vision for Growing Mid Wales’ (May 2020), which highlights that, ‘*The size, remoteness and the dispersed pattern of settlements in Mid Wales presents challenges in both the transport of goods and people.*’⁹ Rurality is the backdrop to many of the issues and challenges across the region, both in terms of travel and transport, but also in terms of wider social and economic issues, such as accessibility, deprivation, and social inclusion. The rural nature of Mid Wales was also emphasised throughout the RTP stakeholder engagement

⁸ [Cover.doc \(walesruralobservatory.org.uk\)](https://www.walesruralobservatory.org.uk), pp.3

⁹ A Vision for Growing Mid Wales – Strategic Economic Plan & Growth Deal Roadmap, May 2020, pp. 35

sessions. Stakeholders highlighted the need to recognise the rural nature of the region when discussing transport issues and barriers and when developing RTP objectives.

3 ECONOMIC CONNECTIVITY

'A Vision for Growing Mid Wales' highlights that, *'Transport connectivity both inside and outside of Mid Wales is crucial to economic flows and future growth.'* This is important for ensuring sustainable economic growth, access to employment, support for tourism and freight connectivity.

Mid Wales has the longest border with England of any part of Wales and cross-border connectivity is important, particularly with Shropshire and Herefordshire in terms of accessing services. The region has strong economic and social connections to the North, South, East and into England via a number of key strategic corridors that people and supply chains rely on heavily, including significant commuting and freight links across into England and the Marches. 'A Vision for Growing Mid Wales' states that, *'the impact of other regions on the Mid Wales economy is critical and plans need to reflect this interdependence'*.

'A Vision for Growing Mid Wales' recognises the importance of transport to the future economic success of the region and highlights the need to address poor transport links and connectivity to ensure the economic potential of Mid Wales is realised. It recognises the current transport challenges and that the current transport situation in Mid Wales does not reflect the collective economic ambitions and aspirations for the region. These issues will be explored within this Case for Change.

4 KEY POPULATION CHARACTERISTICS

4.1 POPULATION TRENDS

Census data provides an insight into population changes in the region over time and shows variations in population trends between the Mid Wales local authorities. Table 4-1 shows that between 2011 and 2021 the population size of Powys has increased slightly (0.2%), but the figure is lower than the overall increase for Wales (1.4%). In comparison, the population size of Ceredigion fell by 5.8% over the same time period, which is the largest decrease of all local authorities in Wales.

Table 4-1 - Population change in Mid Wales between 2011 and 2021 (Census data)

	Ceredigion	Powys
Total population 2011	75,900	133,000
Total population 2021	71,500	133,200
Percentage change	-5.8%	+0.2%

Mid Wales has a particularly high proportion of residents aged 65 and over, with Powys having the highest proportion of all local authorities in Wales (27.9%).¹⁰ Table 4-2 shows that Powys also had a greater increase in people aged 65 and over between 2011 and 2021 than the Wales average. Powys is one of 8 local authority areas in Wales, where the total number of people aged 65 years and over has increased by 20% or more between 2011 and 2021.

Table 4-2 also shows that both Mid Wales local authorities have greater decreases in the total number of people aged 15 to 64 and under 15 years than Wales as a whole, which is likely to reflect out-migration of working age people and their families. Ceredigion and Powys are the two Welsh local authority areas that have seen the largest percentage decreases in children aged under 15 years.

¹⁰ [Age - Census Maps, ONS](#)

Table 4-2 - Population change by age group between 2011 and 2021

	Ceredigion	Powys	Wales
People aged 65 and over	+17.2%	+22.3%	+17.7%
People aged 15 to 64 years	-12.2%	-5.8%	-2.5%
Children aged under 15 years	-10.1%	-9.3%	-1.0%

As stated in 'A Vision for Growing Mid Wales', the region is characterised by an ageing population and a net out-migration of young people. As a result, the number of those of working age has declined and there is a projected decline in the Mid Wales economy of 3.45% between 2018-2040. This trend of rural depopulation, combined with an ageing population, has economic, social and cultural consequences. For example:

- A reduced working age population impacts labour supply, which affects local employers and the economic viability of an area;
- A lack of labour affects public services, which are relied on heavily by the ageing population;
- The deterioration of local services, including leisure and commercial facilities, may have an impact on a younger person's decision to leave an area; and
- A loss of people and businesses can result in areas finding it difficult to retain existing residents or attract newcomers.¹¹

The ageing population in Mid Wales, as across Wales as a whole, will present challenges in future transport provision. In addition, transport will have a role to play in targeting issues that are linked to both rural depopulation and the retention of working age people and their families. For example, stakeholder engagement has highlighted the importance of access, not just to employment, but to cultural and leisure facilities for younger people.

4.2 CAR OWNERSHIP

The rural nature of the region has resulted in a high dependence on the private car for transport. Levels of car ownership are high, which reflects the rural nature of the Mid Wales area, with car ownership seen as more of a necessity than other areas of Wales. This point was highlighted in the Powys Well-being Assessment, which stated that '*often households run two cars due to rural nature and limited public transport.*'¹² This suggests that there is greater need to own a private vehicle in the

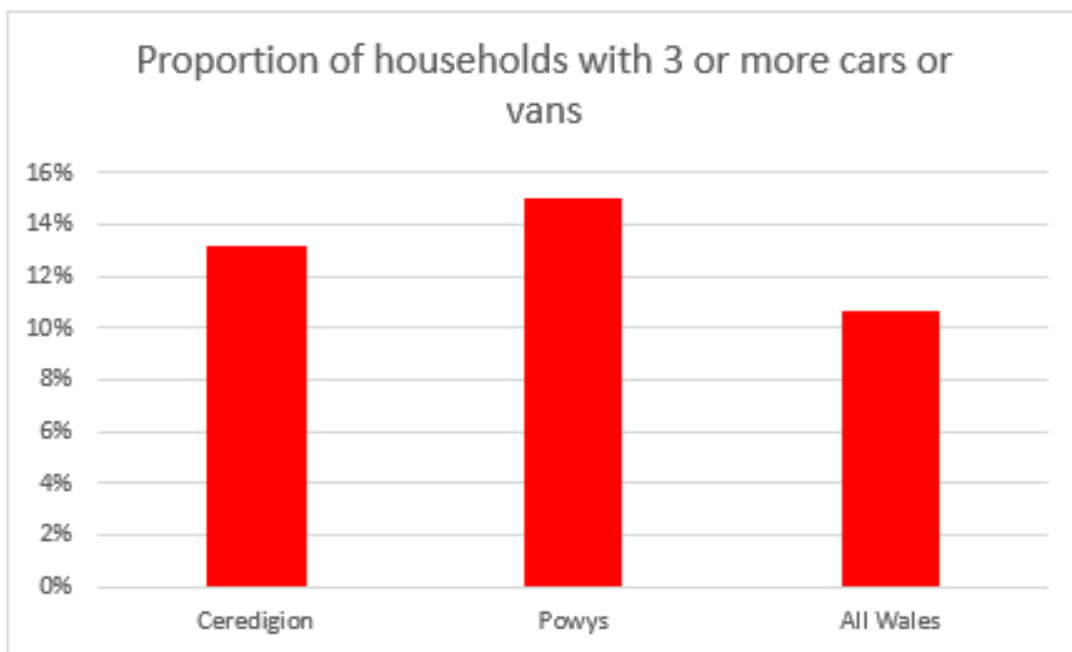
¹¹ Tackling Rural Depopulation, Wales Centre for Public Policy (December 2023)

¹² Well-being Assessment – Powys Public Service Board, March 2022, pp. 13

region than other areas of Wales, but also reflects the lack of public transport services that suit the daily needs of the Mid Wales population, such as to places of work, education or health services.

Census 2021 data shows this trend across Wales, whereby data on car or van availability within households suggests that *‘the proportion of households with cars or vans is higher in the rural local authorities than in more urban areas.’*¹³ Figure 2 shows that, in the Mid Wales local authorities, the percentage of households with 3 or more cars or vans is higher than across Wales as a whole. Powys is the local authority with the highest percentage of households with 3 or more cars in Wales (15%). The equivalent percentage in Ceredigion is 13.2% and this drops to 10.7% across Wales as a whole.

Figure 2: Proportion of households with 3 or more cars or vans (Census 2021)

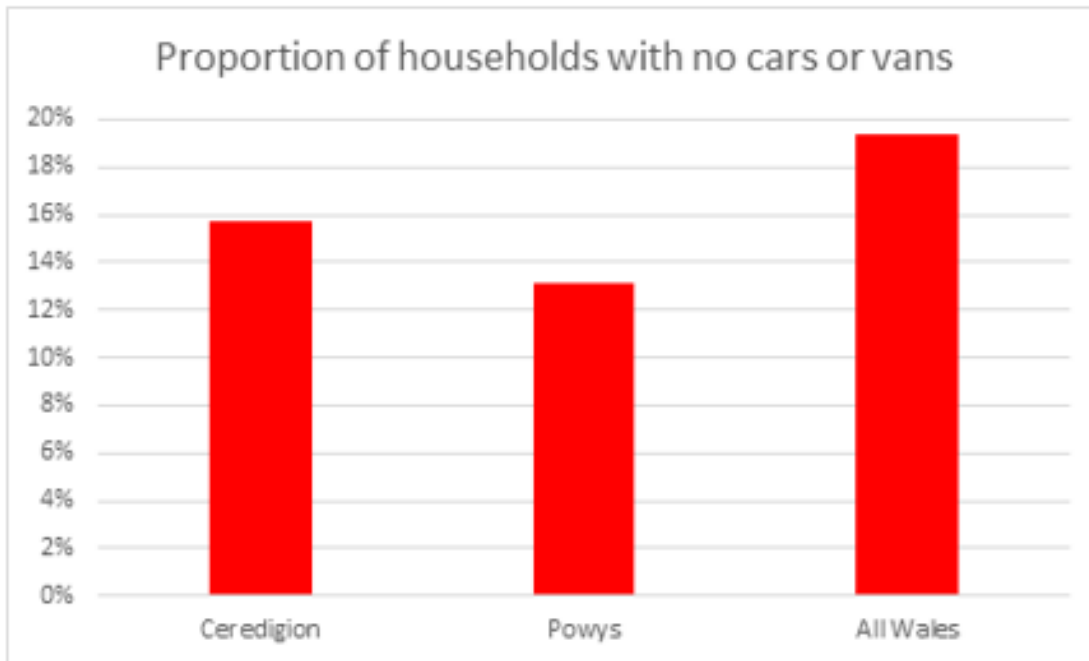


Due to the rural nature of the region, it is important to understand the proportion of households in Mid Wales that do not have access to a car or van, as it is the lack of access to private transport that is likely to have the greatest impact on the daily life of Mid Wales residents. Figure 3 shows that the percentage of households with no cars or vans is lower in Powys (13.1%) and Ceredigion (15.7%) than Wales as a whole (19.4%). However, these figures still represent a significant proportion of households in the two Mid Wales local authorities that do not have access to private transport. As alternative travel options for those without private transport are more limited in the Mid Wales region, due to fewer public transport alternatives, the impact in terms of transport options is likely to be more acute. A lack of alternative sustainable travel options can lead to problems in accessing key

¹³ [Housing in Wales \(Census 2021\) | GOV.WALES](https://gov.wales/housing-in-wales-census-2021)

services, such as employment and education opportunities, for those that do not have access to a car. This can lead to experiences of ‘transport poverty’.

Figure 3: Proportion of households with no cars or vans (Census 2021)

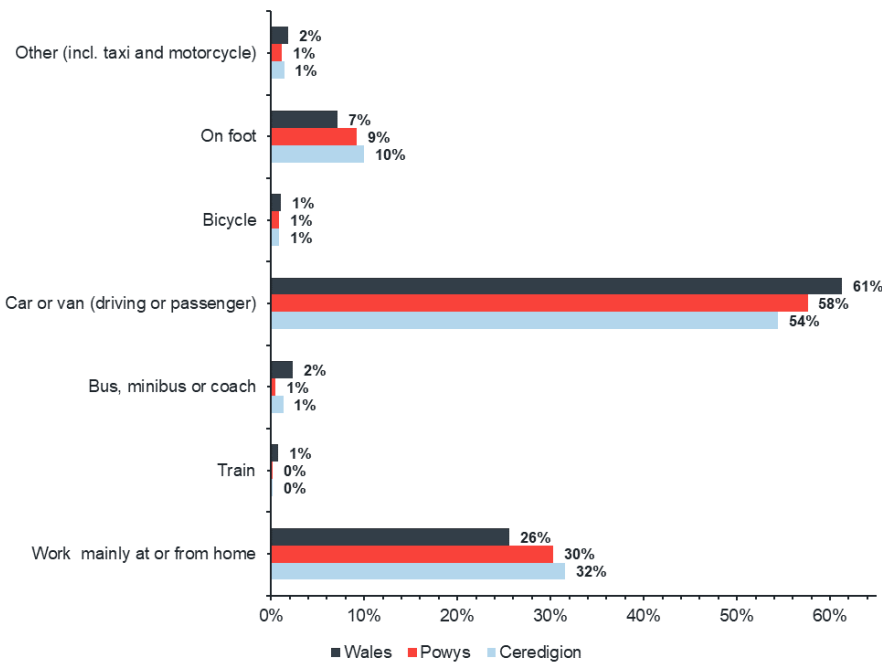


4.3 JOURNEYS TO WORK

Census 2021 data provides an indication of levels of car use for commuting journeys. It should be noted that the Census was undertaken during the coronavirus pandemic, which is likely to have a significant impact on travel to work data and particularly the percentage recorded as working from home. Figure 4 shows that:

- Over 30% of people worked from home in both Powys and Ceredigion, which was higher than the figure across Wales as a whole (25.6%).
- Car travel was the dominant mode of travel to work, with 57.6% in Powys and 54.4% in Ceredigion, travelling to work as either a car driver or passenger.
- The proportion of people travelling to work by car was lower in Mid Wales than Wales as a whole, which is likely to partly reflecting the higher levels of homeworking.
- The data shows low levels of public transport use for work journeys across the region.
- The proportion walking to work in Mid Wales was higher than Wales as a whole, which is likely to be linked to the distance people travel to access their workplace.
- Census 2021 data showed that 28.3% of employed people in Ceredigion and 24.6% in Powys travel less than 10km to work.

Figure 4: Census data 2021: Modal Split (Travel to work)¹⁴



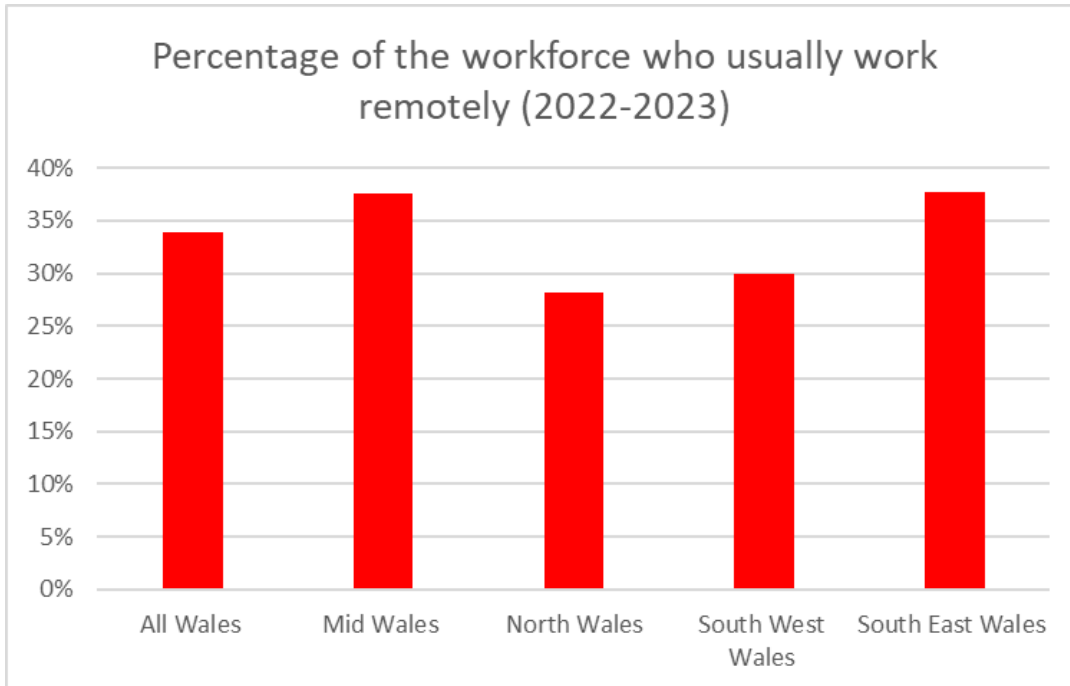
It should be noted that this Census data focuses on commuting journeys, however when considering regional travel patterns and transport choices, it is also important to recognise the importance of leisure and tourism journeys in terms of both people’s needs and a sustainable economy.

More recent data is available for the ‘percentage of the workforce who usually work remotely’ from the National Survey for Wales in the years following the coronavirus pandemic.¹⁵ Figure 5 shows that 37.5% of the workforce usually work remotely, which is higher than the Wales-wide figure of 33.9%. It shows that other than South East Wales, the Mid Wales region had the highest proportion of residents working remotely on a regular basis. This is one of the key monitoring measures of the WTS and is linked to the Welsh Government target of having 30% of the workforce working remotely on a regular basis. These results may be reflective of the greater flexibility in working patterns as a result of COVID-19 and could also, in the case for Mid Wales, reflect the distances those living in mid Wales have to travel to attend their usual place of work.

¹⁴ Census 2021

¹⁵ [Key measure M5 | Transport for Wales \(tfw.wales\)](https://www.tfw.wales)

Figure 5: Percentage of the workforce who usually work remotely (2022-2023)¹⁶



4.4 COMMUTING PATTERNS

Commuting data from the Annual Population Survey, shows that in 2023 there were 12,400 trips out of Mid Wales and 16,800 trips into the area.¹⁷ Of those travelling out of the area, approximately 3,200 were to Carmarthenshire and 3,600 to the West Midlands. Of those travelling into the area, approximately 4,000 were from South-East Wales, 2,400 from Carmarthenshire and 5,100 from the West Midlands.¹⁸ There are clearly significant commuting links, as well as freight links, across into England.

The proportion of commuting journeys being made to and from neighbouring local authorities in Wales and to England demonstrates the importance of the highway network and cross border movement for essential economic activities such as employment. Table 4-3 shows the likely highway route that is used to make these commuting journeys, with these routes being pivotal to essential journeys to and from Mid Wales.

¹⁶ Census 2021

¹⁷ [Commuting patterns by Welsh local authority and measure \(gov.wales\)](https://gov.wales/commuting-patterns-by-welsh-local-authority-and-measure)

¹⁸ [Detailed commuting patterns in Wales by Welsh local authority \(gov.wales\)](https://gov.wales/detailed-commuting-patterns-in-wales-by-welsh-local-authority)

Table 4-3 : Highway connections to origin and destination commuter journeys

Origin and destination locations	Connections
Carmarthenshire	A40 / A483
West Midlands (England)	A44 / A438 / A458
South East Wales (no specified local authorities)	A470 / A40

5 THE MID WALES TRANSPORT NETWORK

Existing transport infrastructure in Mid Wales reflects the rural geography of the region, along with the low population densities and dispersed settlement patterns.

5.1 THE HIGHWAY NETWORK

The network of strategic road corridors in Mid Wales is large due to the vast area covered, but it is also constrained by the geography of the region. Mid Wales has a significant highway network which contributes heavily to its economic performance, but also plays a significant role in the way Wales as a nation is travelled. The region has 945 km (587 miles) of Trunk and A roads connecting the region with North and South Wales and east to the West Midlands.¹⁹ Roads are predominantly single carriageway, causing poor average speeds and long journey times.²⁰

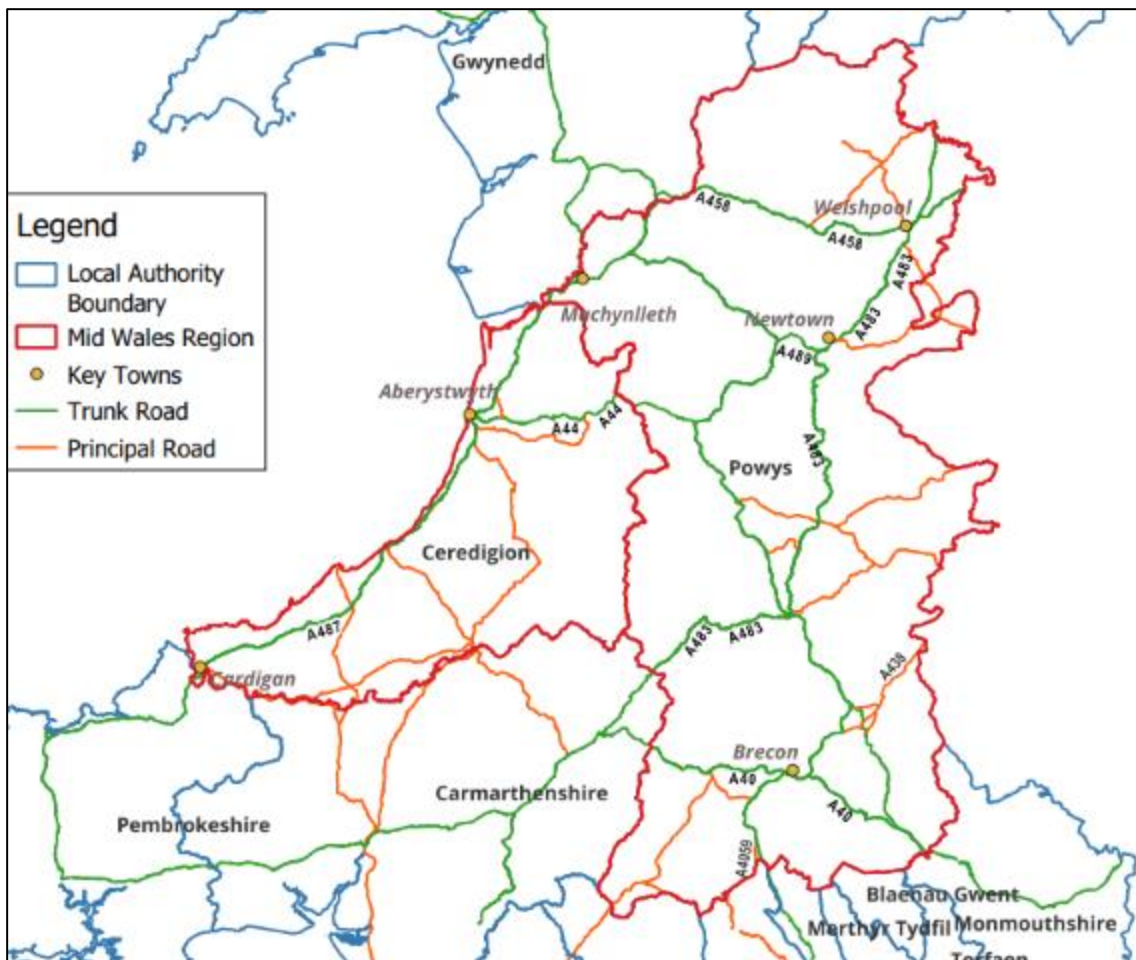
Figure 6 shows the key routes on the strategic highway network in Mid Wales. There are key routes that are integral to the movement of labour and goods, for example the A483 and A458 cross-border routes and the A44 east-west across the region between Aberystwyth and Herefordshire. The previous Joint Local Transport Plan identified that the A483 link from Shropshire is the main route for journeys in and out of the region with the highest Annual Average Daily Traffic (AADT) flows. Other notable routes in the region are A483/A489 Newtown Bypass, the A487 coastal route from Machynlleth to Cardigan and the A470 north-south through the region.

The highway system plays a key role in transporting people and good across the region. The crucial role of the highway network in Mid Wales was emphasised during stakeholder engagement, due to e.g. its importance for accessibility between communities and in providing connections to the larger towns; regional connectivity between North and South Wales; the transportation of freight; and its importance for bus services. Both Powys and Ceredigion are integral to the connectivity of major settlements in North Wales with those in the South. The importance of the role of Mid Wales in 'connecting the nation', due to the need for all journeys to go through Mid Wales when travelling between North and South Wales, was highlighted during stakeholder engagement.

¹⁹ A Vision for Growing Mid Wales – Strategic Economic Plan & Growth Deal Roadmap, May 2020, pp. 16

²⁰ A Vision for Growing Mid Wales – Strategic Economic Plan & Growth Deal Roadmap, May 2020, pp. 35

Figure 6: Mid Wales Strategic Highway Network



5.2 BUS SERVICES

The crucial role of the highway network to bus services was emphasised during stakeholder engagement. The primary operators providing a large proportion of bus services across Mid Wales include, but are not limited to, Celtic Travel, Tanat Valley Coaches, Mid Wales Travel, Owens of Oswestry, and Richards Brothers. TrawsCymru, funded by the Welsh Government, also provide some longer distance routes within Mid Wales and connections to neighbouring local authorities, e.g. Carmarthen to Aberystwyth. The reach of the main bus operators across Mid Wales is described in Table 5-1 highlighting that current bus services in Mid Wales lack interconnectivity between towns, particularly in the more rural areas. The reach and limitations of the bus network in Mid Wales will be considered further in Section 6.

Table 5-1: Main bus operators in Mid Wales

Bus operator	Reach
Celtic Travel	Provides connections to the main towns and some more rural settlements, but through limited services which are not conducive to standard working patterns. Does not operate on Sundays.
Owens Travel	Operates on limited days. Provides local services with no interconnectivity between towns or villages.
First Bus	Services are isolated to the south of Powys with connections outside of the Local Authority area to Swansea and Neath. Operates one interconnecting service between Aberystwyth and Carmarthen.
Tanat Valley Coaches	Offers connections between and within smaller towns in north and east Powys. Some services operate between Welshpool and Newtown.
Traws Cymru	Provides good connections across several services operating throughout the region, with some service gaps in the more rural central Powys.

In addition, there are community transport services operating in the region that provide essential transport for those unable to access public transport services. For example, the Powys Well-being Assessment states that, *‘in Powys there are several successful schemes in operation, and most have been developed to meet the needs of disabled and older people.’*²¹

5.3 FREIGHT CONNECTIVITY

Freight plays a key role in supporting economic growth across Wales²² and has a significant presence in Mid Wales. The Marches and Mid Wales Freight Strategy²³ provides insight into the current freight situation in the region and its cross-border connectivity. Transit movements make up 35% (930,000) of all annual HGV movements in Mid Wales, with almost half of all HGV movements being distances of less than 50km. Aside from the Aberystwyth to Chirk timber freight train service, all freight movements in Mid Wales are focussed on the road network, which is comprised of single carriageways and presents a number of challenges to freight connectivity, including:

- Slower speeds including from farm traffic;
- Longer journey times;
- Poor journey time reliability;
- Poor carriageway conditions;
- A lack of alternative routes; and
- Little resilience to road incidents.

²¹ Well-being Assessment – Powys Public Service Board, March 2022, p.116

²² Report of Wales Freight Working Group, Welsh Government, March 2016

²³ The Marches & Mid Wales Freight Strategy

The stakeholder workshop also highlighted the importance of last mile courier services in rural areas with many retail centres being located too far away, encouraging an increase of e-commerce deliveries.

5.4 THE RAIL NETWORK

Rail provision in Mid Wales is limited in terms of the reach of the network and the frequency of services. There are two railway lines within the Mid Wales region, the Cambrian Main Line and the Heart of Wales line, which run north-south and east-west. These are shown in Figure 7, which also shows the two tourist rail lines in the region.

Current railway station usage is poor, with only four stations in Mid Wales (Aberystwyth, Machynlleth, Newtown and Welshpool Railway Stations) receiving over 50,000 entries and exits between 2022 and 2023.²⁴ There are a number of factors affecting rail patronage in Mid Wales, including the availability of services, accessibility, reach in a rural area, and affordability. Rail patronage is also impacted by line closures due to engineering works, along with services that do not meet the needs of the communities they serve.

The rail lines in Mid Wales have a low service frequency, slow line speeds, and there are limited direct services to major UK cities with the only regular service being the two-hourly service from Aberystwyth to Birmingham International along the Cambrian Line, with additional station stops in the key Mid Wales towns of Welshpool, Newtown and Machynlleth. The lack of north-south rail services is highlighted by the Ceredigion Well-being Assessment, which provides the example that *'taking a train from Aberystwyth to Carmarthen would take over 6 hours', with the equivalent journey by car taking 'just under 1 hour 30 minutes'*.²⁵

In addition, as part of the TfW Future Timetable Review, there are proposed reductions to the services frequencies on both the Heart of Wales and Cambrian Line from December 2024. This includes reducing the Heart of Wales Line services from five through services to four per day and removal of the two late evening services to Llandovery and Llandrindod.²⁶ Stakeholder engagement highlighted concerns that the impact of inevitably lower passenger demand in a rural area, has a detrimental impact on the level of service that is provided and that cuts to services are made due to low passenger numbers. The TfW Timetable Review makes reference to bus options being explored in relation to the Heart of Wales line and stakeholder engagement highlighted the need to strengthen bus services if rail services are to be reduced. The TfW Future Timetable Review also states that an hourly service between Aberystwyth and Shrewsbury will be introduced from May 2026, but that this will only run from May to September.²⁷ Concerns were also raised during stakeholder engagement regarding the difficulties of seasonal services for residents, who would be unable to use such a service as a year-round commuting option.

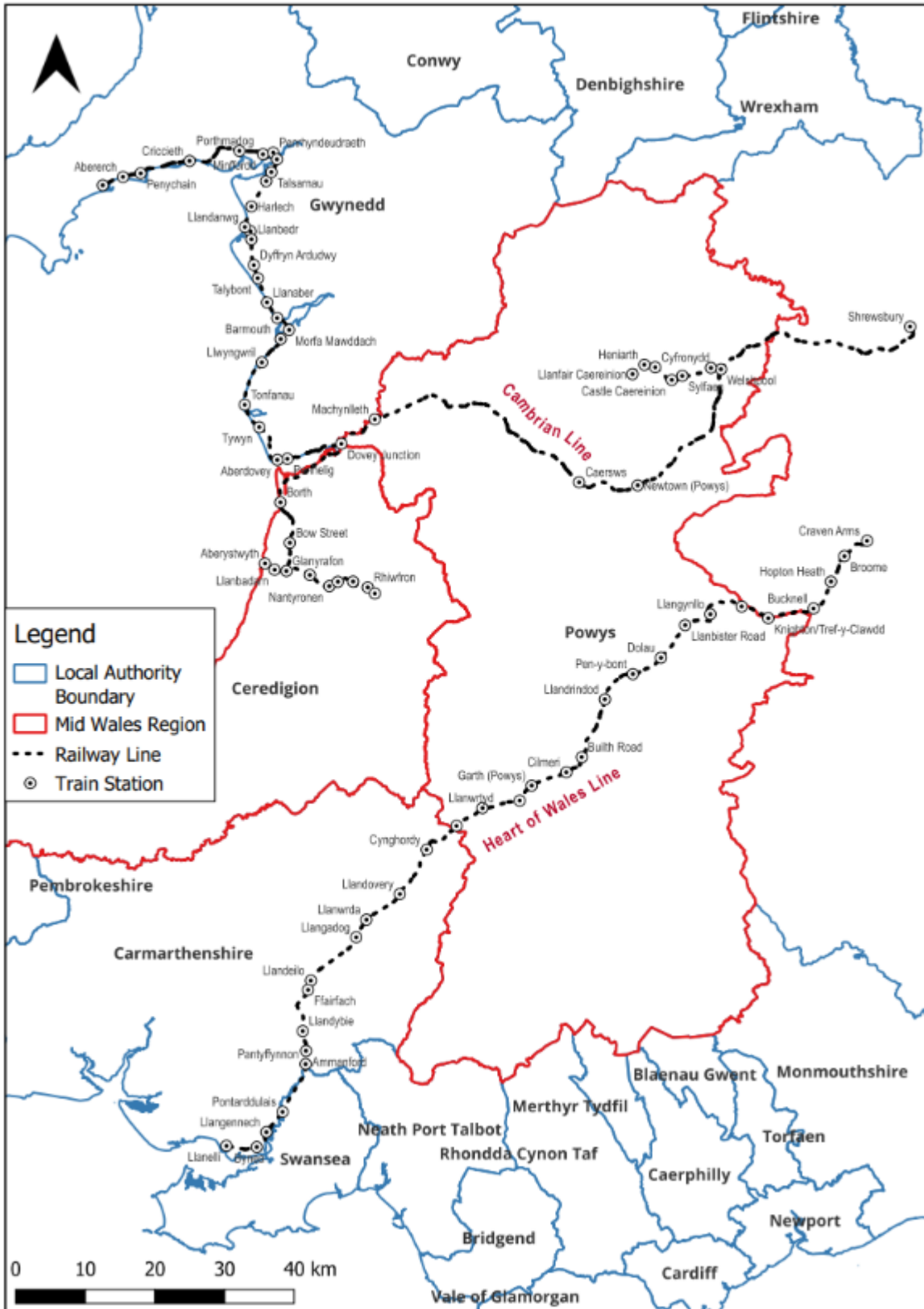
²⁴ [Number of rail station entries and exits in Wales by station and year \(gov.wales\)](#)

²⁵ Ceredigion Assessment of Local Well-being, Ceredigion Public Services Board, 2022, pp.40

²⁶ [TfW Future Timetable Review | Have your say by Transport for Wales](#)

²⁷ [TfW Future Timetable Review | Have your say by Transport for Wales](#)

Figure 7: Mid Wales Rail Network



5.5 THE ACTIVE TRAVEL NETWORK

Across the Mid Wales region, the active travel network is relatively limited, lacks density and connectivity, and is concentrated in and around the main towns. This reflects both rural nature of the area and the focus of the Active Travel Act on built-up areas. This results in a concentration of existing and proposed active travel infrastructure focusing on the main towns, e.g. Aberystwyth, Newtown, and Welshpool. Stakeholder engagement highlighted the differences between the more urban areas of the region, with towns generally being relatively walkable and providing opportunities for active travel, and the wider rural areas with limited opportunities for walking, e.g. to work.

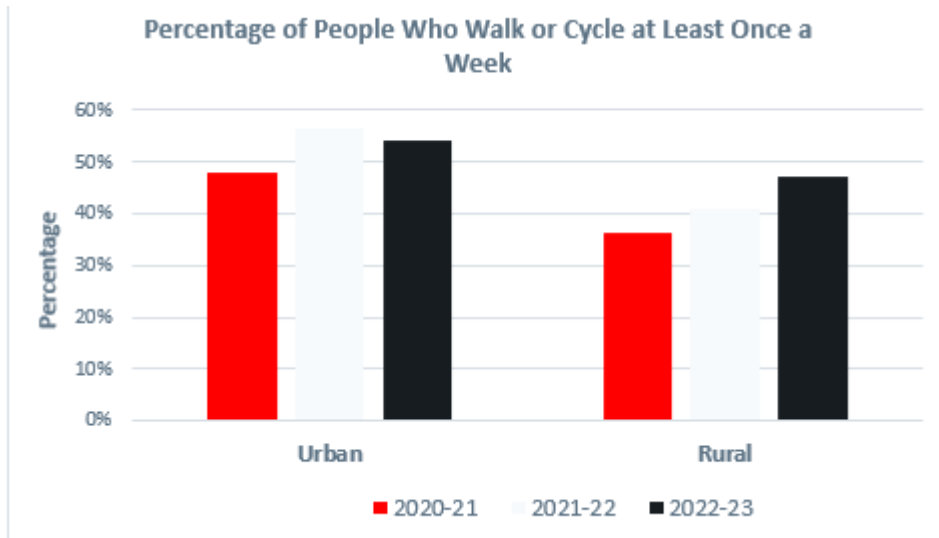
The dominance of car travel generally in Mid Wales, also results in a dominance of car use in town centres, and this can have a negative impact on the attractiveness of active travel options in and around the main towns in the region. Stakeholder engagement suggested that 'different demographics want different things from town centres', with reference to the challenges of removing cars from town centres for the benefits of pedestrians, alongside the need for continued access to town centres by car certain sectors of the population, e.g. older people with reduced mobility.

The issue of connecting communities by active travel was also raised during stakeholder engagement, and the need to not only focus on the main towns but to also consider links between communities. This highlights that there are wider opportunities for walking and cycling, beyond the built-up areas that are currently the focus of the active travel network. The rural nature of the region, coupled with its size and scale, make it challenging for expansion. The distance between key settlements in the region prevent connectivity of routes, making it difficult to achieve an extensive active travel network. This lack of coverage and connectivity, however, present an opportunity for improvements to the wider walking and cycling network in future years.

Figure 8 shows the percentage of people who walk or cycle at least once a week as a means of transport, which is a WTS Monitoring Measure.²⁸ The data shows the differences in urban and rural areas across Wales, in the absence of regional data. It shows that the proportion of walking and cycling in rural environments is steadily increasing in Wales, although it still falls behind the proportion of those walking and cycling in urban settings by around 10%.

²⁸ [Subsidiary measure S4 | Transport for Wales \(tfw.wales\)](#)

Figure 8: The Percentage of People Who Walk or Cycle at Least Once a Week, by rural and urban status



The difference between urban and rural areas is likely to partly reflect the more limited walking and cycling infrastructure in rural areas. In urban areas, active travel infrastructure tends to be found more frequently, and it is often easier to create a comprehensive and well-connected network of active travel routes. As such, active travel networks found in larger urban areas prove more useful to people’s daily needs, e.g. it is more common in urban areas for people to walk or cycle from their homes to their place of work using entirely dedicated active travel infrastructure.

The nature of the rural highway network, which often has a lack of footway provision and relatively high traffic speeds, means that there are limited options for walking and cycling journeys between rural communities. These issues are likely to lead to road safety concerns for pedestrians and less experienced cyclists and has a negative impact on levels of walking and cycling due to a lack of dedicated routes that are segregated from traffic. Stakeholder engagement highlighted the importance of pavements as ‘an essential piece of transport infrastructure’ to enable people to walk around their communities.

6 PUBLIC TRANSPORT CHALLENGES

6.1 PUBLIC TRANSPORT AVAILABILITY

The availability of public transport options is limited due to the rural nature of the area, along with a dispersed settlement pattern, and the reach of the rail and bus network. This results in low levels of public transport use across the region. Across Mid Wales there is limited public transport availability to many smaller communities, with a discrepancy between bus connections to the main towns in Mid Wales and to smaller, less populous towns and settlements. Larger towns, such as Welshpool, Newtown and Aberystwyth have more connections by bus including a wider range of destinations and more frequent services compared to more rural areas. The Ceredigion Well-being Assessment recognises that, *'Public transport, namely bus services are very limited across the county especially for the more rural areas. Buses that run throughout the day service the main towns, but these services travel mostly to and from the more urban areas'*.²⁹ Public funding cuts have further decreased the availability of bus services in rural areas³⁰, causing potential long-term issues in the availability of public transport.

Figure 9 and Figure 10 show the volume of public transport users along routes in both the morning peak period of 08:00am to 09:00am (Figure 9) and the evening peak period of 17:00pm to 18:00pm (Figure 10). The data shows the location of the public transport links in the region and the reach of bus services in providing connections between towns and smaller communities. The most heavily used public transport routes (the thickest red lines) are the east-west Cambrian Rail Line, as well as bus routes to and from the main towns in the region, e.g. linking into Aberystwyth, Newtown, Brecon, Lampeter and Aberaeron. There are significant public transport 'black spots' across the region, which will have significant impacts on people ability to work and access key facilities and amenities in the absence of a private vehicle.

²⁹ Ceredigion Assessment of Local Well-being, Ceredigion Public Services Board, 2022

³⁰ Ceredigion Assessment of Local Well-being, Ceredigion Public Services Board, 2022

Figure 9: Public Transport Volume (Persons) 08:00am - 09:00am (2019)

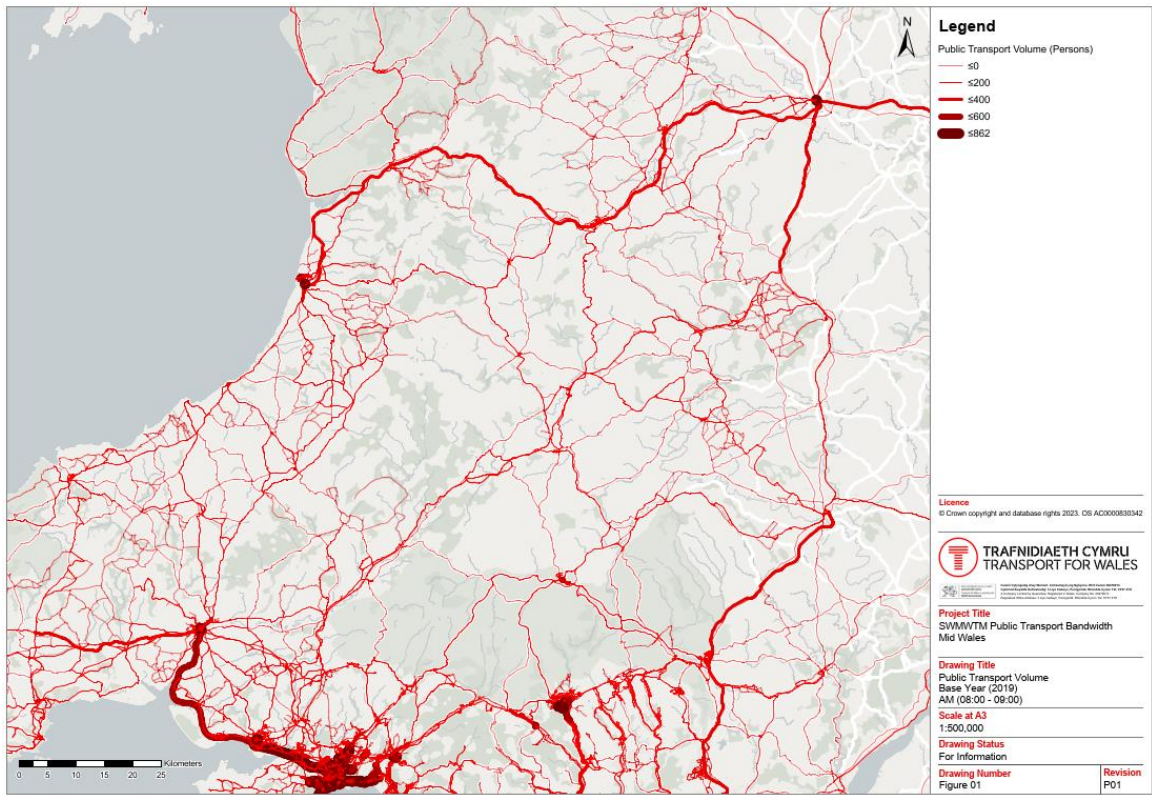
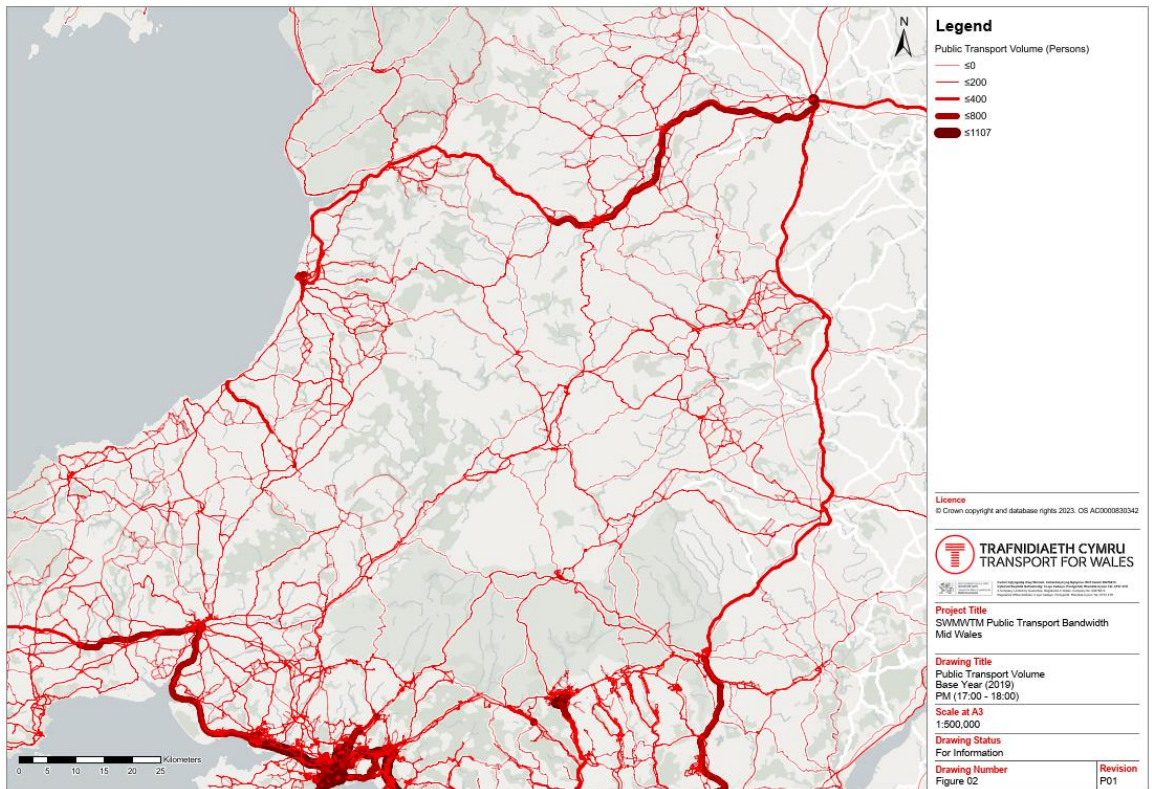


Figure 10: Public Transport Volume (Persons) 17:00pm - 18:00pm (2019)



6.2 TIMING OF SERVICES

In addition to the overall reach of the public transport network, a further issue is the timing of services. There is a lack of evening and weekend bus provision in many areas, which leads to difficulties in accessing key services, and again contributes to a reliance on car travel. The variations in provision are shown in Figure 11, Figure 12 and Figure 13, which show the last public transport departure times on Tuesdays, Saturdays and Sundays.

Figure 11 shows that areas such as Welshpool, Newtown, Machynlleth, Llandrindod, Brecon, Aberystwyth and Cardigan have the latest public transport departure times on a Tuesday (9pm to midnight). Being key towns, public transport departure times in these areas are later as expected, coinciding with a greater number and density of facilities and amenities.

Figure 11 also shows that many areas in Powys and Ceredigion have areas where the latest departure time for public transport services is earlier than 6pm, or there is no service at all on that given day. The most apparent cases of this can be seen in areas such as the Llanfair Caereinion and Llanfyllin area in north Powys, and Rhayader and Tregaron in the centre part of the Mid Wales region. The significance of having early (or absence of) public transport departures is particularly limiting to those who are reliant on public transport services, e.g. for work, health or educational purposes.

Figure 11: Last Public Transport Departure - Tuesday (Bus, Coach, Rail)

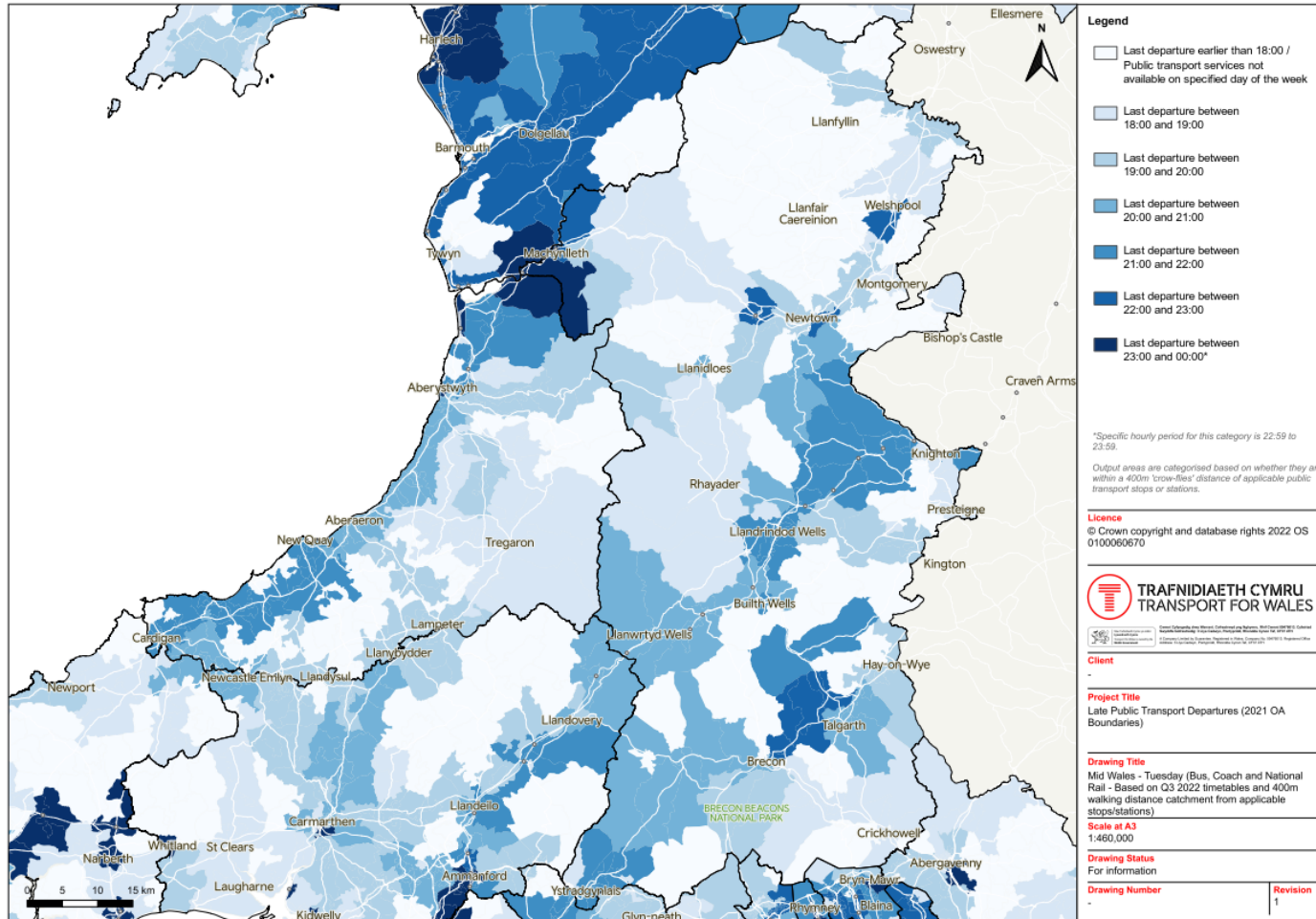


Figure 12 shows broadly similar results to those in Figure 11, although there are some minor differences such as south Aberystwyth and Cardigan have marginally later public transport departure times on a Saturday. Areas such as Llanfyllin (as referred to previously) also have marginally later public transport departures times. Public transport times on both a weekday and a Saturday are broadly similar across Mid Wales.

Figure 12: Last Public Transport Departure - Saturday (Bus, Coach, Rail)

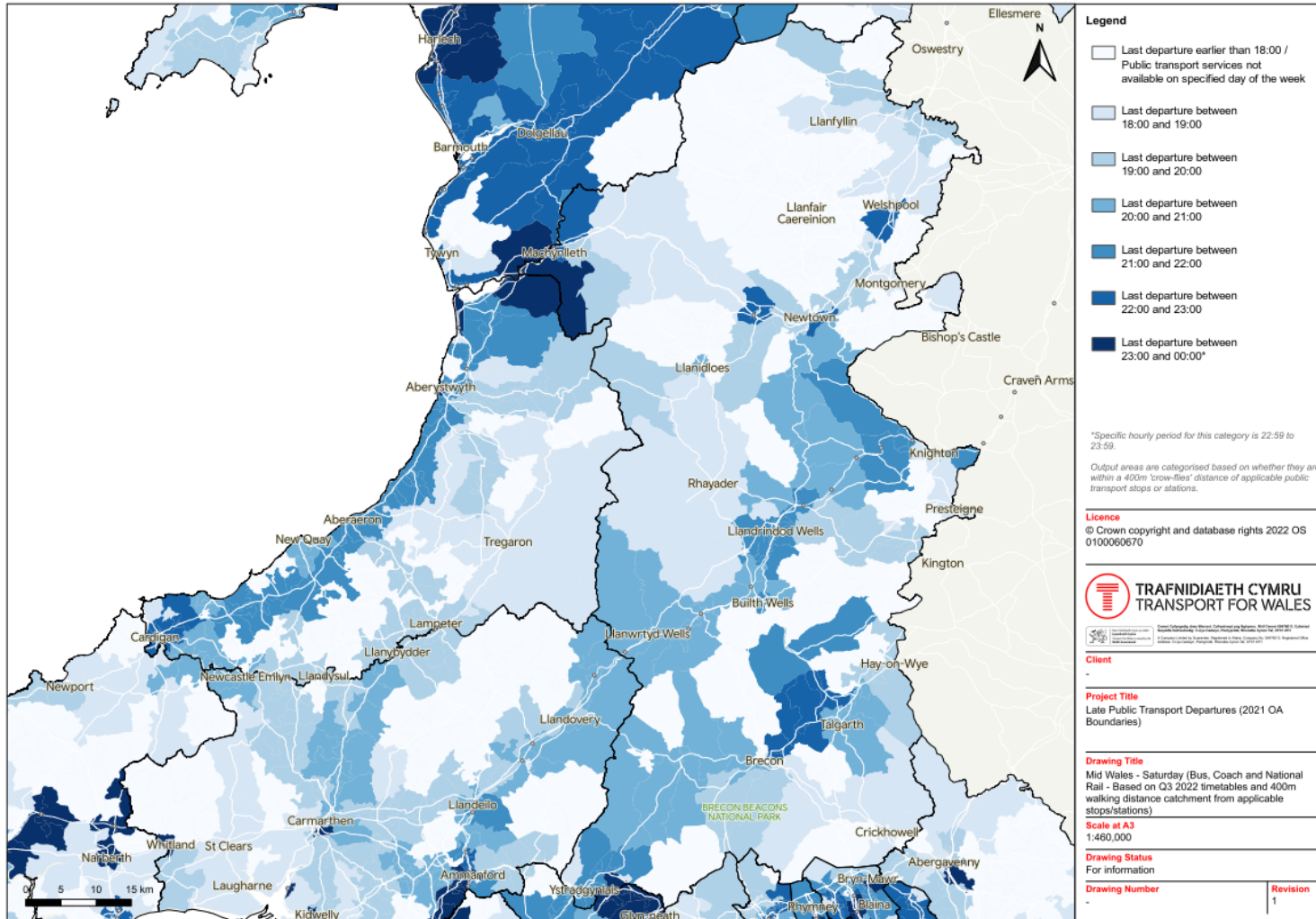
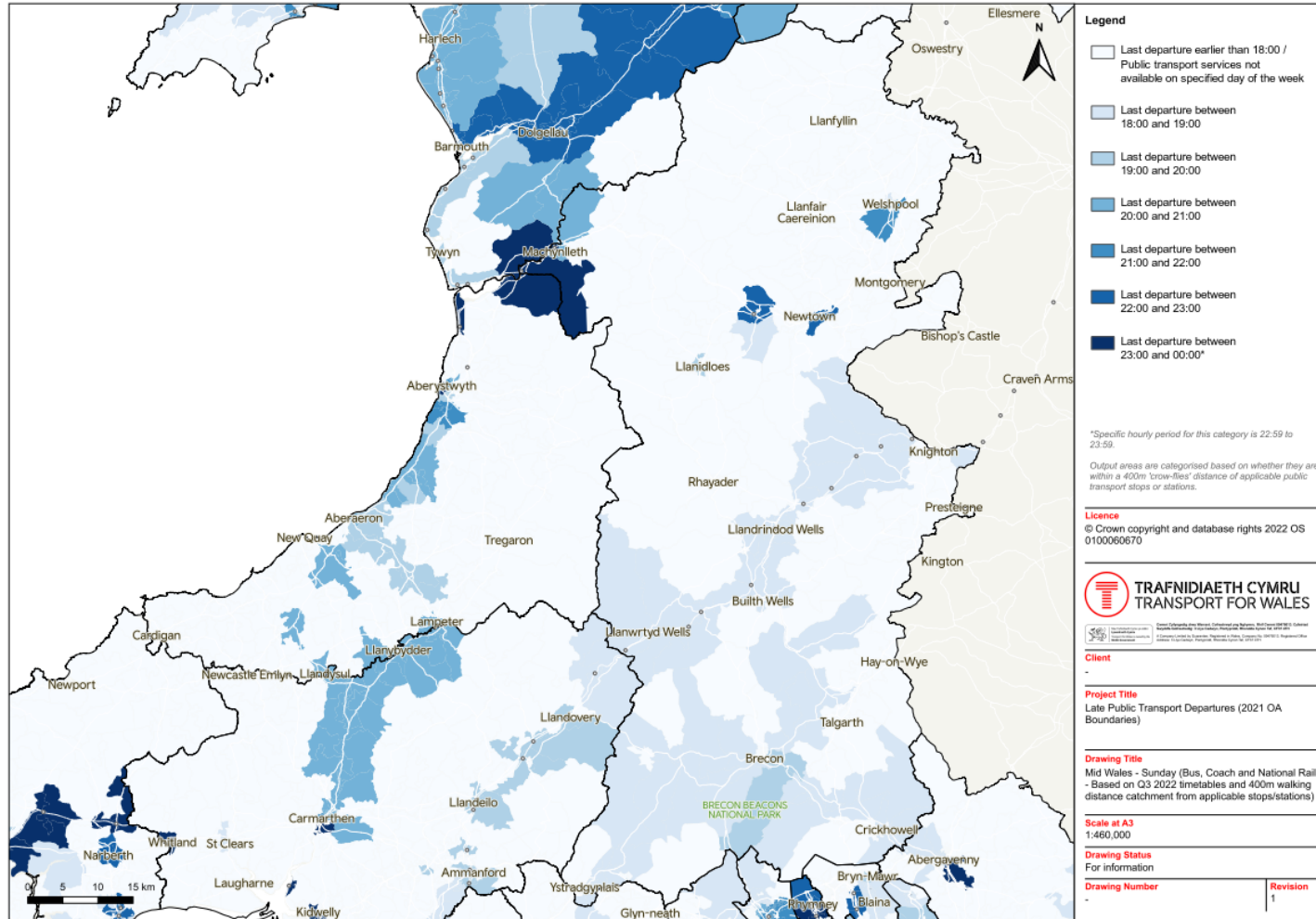


Figure 13 shows the last public transport departure times on a Sunday. It is apparent, when comparing to the last public transport departure times on a Tuesday and a Saturday, that the majority of the region has no public transport service departing later than 6pm on a Sunday. The latest public transport departure times can be seen around key towns such as Welshpool, Newtown, Machynlleth and Aberystwyth.

Figure 13: Last public transport departure - Sunday (Bus, Coach, Rail)



The Ceredigion Well-being Assessment highlights that, ‘public transport is infrequent to and from some of the most rural areas of the county’ and found that ‘50% of the 17-24 respondents to our Well-being Survey noted that ‘Lack of transport’ was something that concerned them the most about future prosperity in Ceredigion’.³¹

6.3 NETWORK DELAY

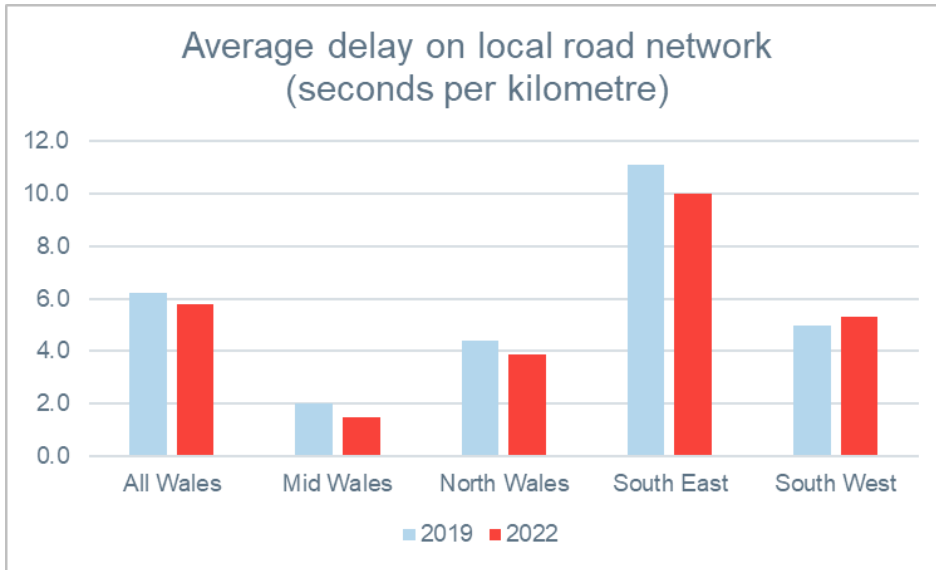
Figure 14 shows the average delay on the local road network, which forms part of a WTS Monitoring Measure.³² Network delay is an issue that affects all users of the highway network, including public transport, private transport and freight. Overall, out of the four regions in Wales, Mid Wales has the smallest delay on the local road network (1.5 seconds per kilometre). Wales as a whole and most regions have shown a reduction in delays between 2019 and 2022, with Mid Wales showing a small reduction of 0.5 seconds per kilometre. Therefore overall, the local highway network in Mid Wales is performing at a level which causes no significant delay, and this is particularly important given the public transport shortfalls and the reliance on the road travel for regional connectivity.

It should be noted that the data provides a very generalised picture of the region and does not highlight more localised issues, such as slow journey times and the impact of road closures, incidents, or roadworks. These can have a significant impact due to the nature of the local road network, e.g. due single lane carriageways, poor opportunities for passing points, and often lengthy diversions. In addition, certain areas will experience increased pressure from tourism during the summer months, which is likely to lead to a degree of seasonality in network delays in some areas. These factors can lead to increased journey times and reduced journey time reliability for the movement of goods and people.

³¹ Ceredigion Assessment of Local Well-being, Ceredigion Public Services Board, 2022, pp. 91

³² [Subsidiary measure S16 | Transport for Wales \(tfw.wales\)](#)

Figure 14: Average delay on local road network (seconds per kilometre)



6.4 PUBLIC TRANSPORT ACCESSIBILITY AND AFFORDABILITY

Ease of access to the public transport network can impact on people’s transport options and subsequent travel choices. For example, the Ceredigion Well-being Assessment noted that the sparsity of bus services in the more rural areas means that bus stops are often too far away to walk, making private vehicles the most accessible option for many.³³ In terms of railway stations, inadequate connections to many of the railway stations in the region is a barrier to using rail as a mode of transport in Mid Wales. Many stations are located a significant distance away from residential dwellings or workplaces, making them only directly accessible to those who live or work within close proximity.

6.4.1 ACCESS TO PUBLIC TRANSPORT

In terms of access to frequent public transport services, only 1% of the population in Mid Wales live less than an 800m walking distance from a rail station with at least one train per hour, compared to 13% in Wales as a whole³⁴. Similarly, just over a quarter of the Mid Wales population live less than 400m walking distance from a bus stop with at least one bus per hour, compared to 70% in Wales as a whole. A related WTS Monitoring Measure is the percentage of people within walking distance of sustainable modes of transport.³⁵ In this data, walking distance is defined as those within a five-minute walk of an hourly bus service or active travel route, or within a ten-minute walk of an hourly rail service. It shows that in Mid Wales, less than 1% of people are within walking distance of a railway station, which reflects both the limited rail network across the region and the rural nature of

³³ Ceredigion Assessment of Local Well-being, Ceredigion Public Services Board, 2022

³⁴ [Llwybr Newydd: Transport data and trends](#)

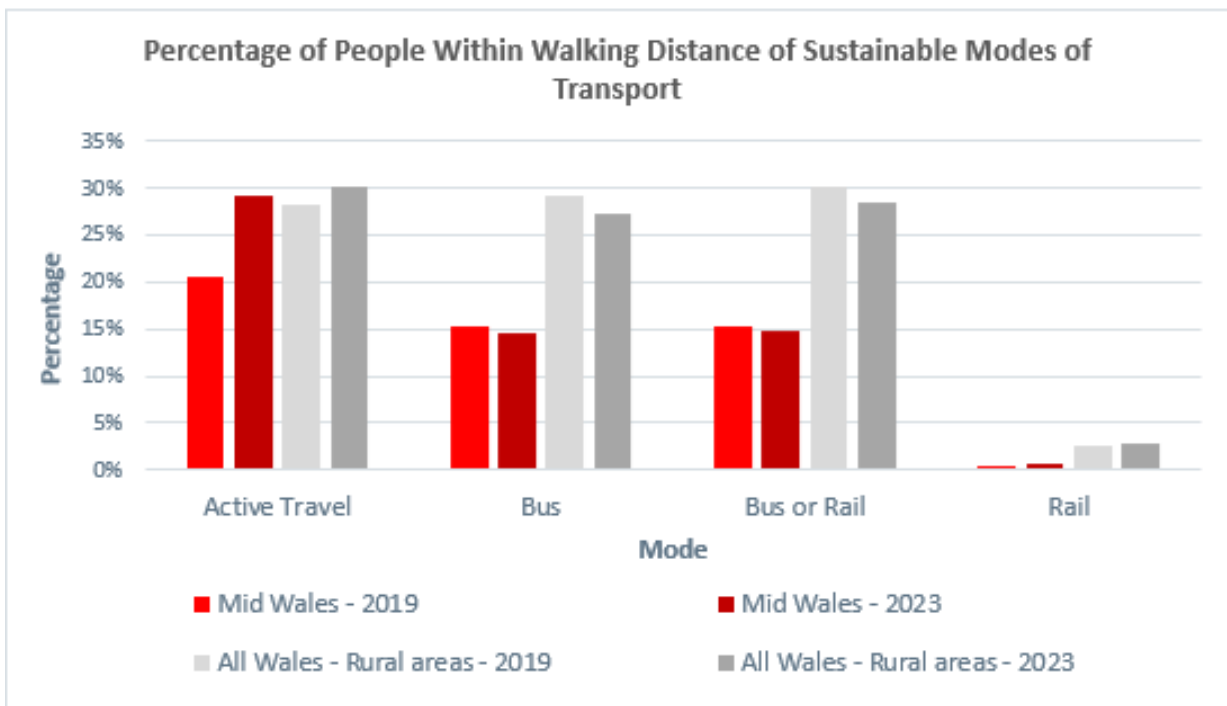
³⁵ [Key measure S3 | Transport for Wales \(tfw.wales\)](#)

the area with a dispersed population. The proportion of people in Mid Wales within walking distance to bus and rail services is significantly lower than rural Wales more generally. For example in 2023, 14.5% of people were within a 5-minute walk of a bus service, compared to 27.4% in rural Wales as a whole. Between 2019 and 2023, the percentage of people within walking distance to bus services in Mid Wales decreased slightly by 0.8%, which could reflect reductions in service levels over this time-period. Similar trends in terms of a decline in the percentage of people within walking distance to bus services can be seen across rural Wales.

In Mid Wales, there has been a notable increase in the percentage of people within walking distance of an active travel route between 2019 and 2023, from 20.6% to 29.2%. It should be noted that this data is based on the information included in the local authorities' Active Travel Network Maps (ATNMs) and could reflect the additional active travel route information included in the most recent ATNMs, rather than solely being due to an increase in the provision of active travel infrastructure. In 2023, Mid Wales had a similar proportion of people within walking distance to an active travel route as the rest of rural Wales.

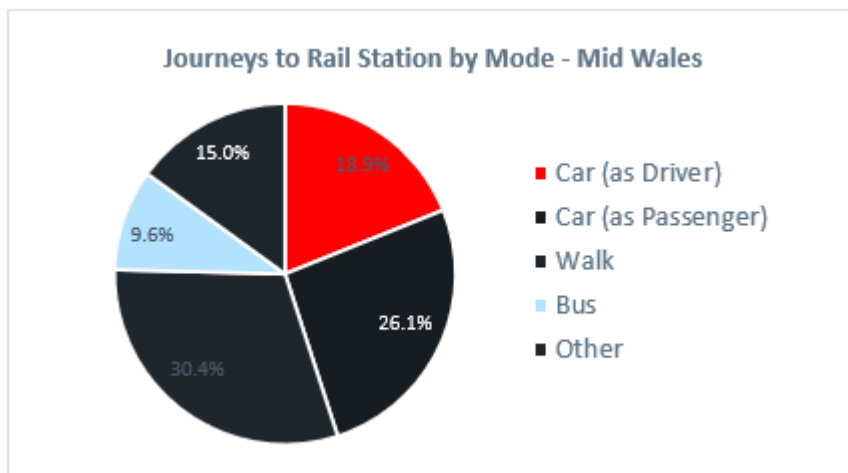
More generally, the WTS Monitoring Measure shows that across the four regions in Wales and across all modes, Mid Wales has the lowest population share within walking distance of sustainable transport and that this is the case in both 2019 and 2023.

Figure 15: Percentage of people within walking distance of a sustainable modes of transport (active travel, bus, rail) – 2019 & 2023



A further WTS Monitoring Measure is the percentage of journeys to a rail station by walking, cycling or bus.³⁶ Figure 16 includes the data for Mid Wales and shows that in 2019, 40% of journeys to rail stations were made by sustainable modes, i.e. walking or by bus. Walking is the most common journey mode to a station (30.4%), which supports the likelihood of people to use rail services that they can access by walking. Car passenger journeys are the second most common, followed by driving a car – together making for over a third of all travellers to railway stations in Mid Wales. Therefore, despite walking being the single most popular mode of transport to railway stations, there is still a high reliance on private car use to access rail services.

Figure 16: Journeys to Rail Station by Mode



6.4.2 PUBLIC TRANSPORT FACILITIES

In terms of transport interchange, many railway stations lack the facilities to interchange between modes. For example, only nine out of the 20 stations in Mid Wales are served by a bus stop that is within an acceptable walking distance. As well as this, 11 stations do not have cycle parking facilities and 8 do not have car parking facilities. Those that do have car parking facilities, often have a limited number of spaces. The lack of interchange ability at railway stations across Mid Wales is a barrier to using public transport by limiting the number of people who are able to access a railway station to those who either live or work within close proximity or have access to a private car.

In terms of access and inclusion, there is a noted lack of adequate public transport for people with disabilities in Mid Wales³⁷. Figure 17 shows the percentage of railway stations that are step-free, which is a WTS Monitoring Measure³⁸. The data shows that Mid Wales has the highest percentage of stations with step-free access, but this only represents four stations, as the number of railway stations overall is lower than the other regions. Mid Wales also has the highest percentage of

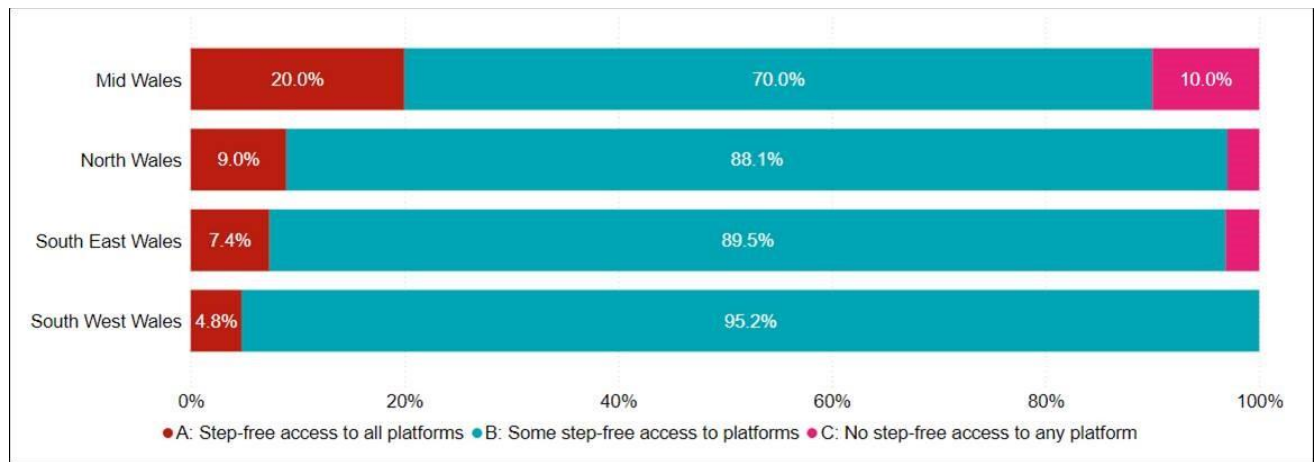
³⁶ [Key measure S5 | Transport for Wales \(tfw.wales\)](#)

³⁷ Ceredigion Well-being Assessment 2022

³⁸ [Subsidiary measure S13 | Transport for Wales \(tfw.wales\)](#)

railway stations with no step-free access to any platform, but this again represents a very small number of stations.

Figure 17: Share of railway station by step-free access*



*Graph taken from Wales Transport Strategy Subsidiary Monitoring Measure S13

6.5 DIGITAL CONNECTIVITY

Levels of digital connectivity and mobile phone coverage in Mid Wales currently lag significantly behind other parts of Wales and the UK with topography and the lower density of population posing particular challenges in improving mobile coverage in the region.³⁹ 9.5% of premises have no 4G services across the region while only 53.6% of premises have 4G services from all four operators compared to Wales (73%) and the UK (80%).⁴⁰ Digital connectivity is important in terms of equality of access to public transport services, e.g. in accessing real time information and accessing on-line services. This gap in digital connectivity acts as a barrier to more affordable and sustainable travel options and could cause an increased reliance on private vehicles being used as the main mode of transport, which may not be financially viable for all. The importance of digital connectivity was also raised during stakeholder engagement, particularly in relation to the increase in remote working. Improved digital connectivity and faster broadband speeds gives people the opportunity to work from home, which will reduce pressures on the transport system.

6.6 AFFORDABILITY

Across England and Wales, rail fares increased by 5.7% in March 2023⁴¹ despite the fact that both Powys and Ceredigion had one of the lowest average weekly earnings in Wales in 2023 (£594 and

³⁹ A Vision for Growing Mid Wales – Strategic Economic Plan & Growth Deal Roadmap, May 2020, pp.15

⁴⁰ A Vision for Growing Mid Wales – Strategic Economic Plan & Growth Deal Roadmap, May 2020, pp.15

⁴¹ [Rail fares index 2023 \(orr.gov.uk\)](https://www.orr.gov.uk/rail-fares-index-2023)

£574, respectively)⁴². For those who already own a private vehicle, continued car use for most journeys may seem the most financially viable compared to purchasing increasingly high rail fares.

In the Ceredigion County Council Wellbeing Survey, 46.4% of respondents stated that affordable sustainable transport will enable them to improve their environment⁴³, which demonstrates that there is demand for more affordable sustainable transport options.

⁴² [Average \(median\) gross weekly earnings by Welsh local areas and year \(£\) \(gov.wales\)](#)

⁴³ Ceredigion Assessment of Local Well-being, Ceredigion Public Services Board, 2022

7 ACCESS TO KEY SERVICES

7.1 INEQUALITY OF ACCESS

A person's ability to access key services can impact on the opportunities they have in terms of, e.g. employment, education, healthcare, shopping, and leisure activities. The rural nature of the region, along with limited public transport availability, means that access to services is variable across Mid Wales and can disproportionately affect certain groups, e.g. young people without access to private transport options. Such inequalities of access can impact on a person's economic, social, and mental well-being.

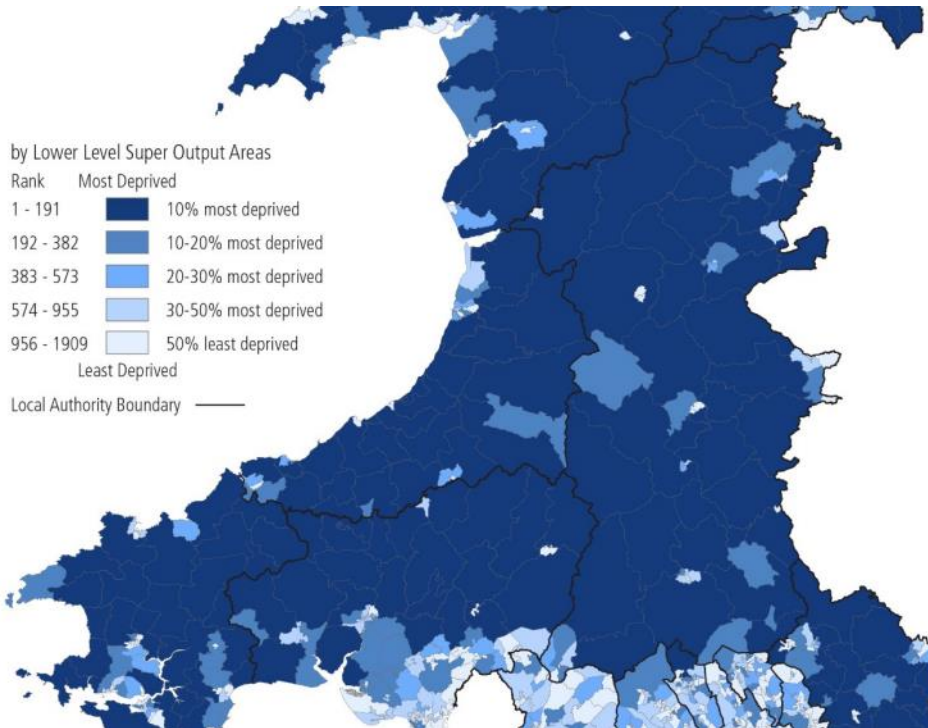
The Welsh Index of Multiple Deprivation (WIMD) 2019 ranks all small areas (i.e. Lower-layer Super Output Areas or LSOAs) in Wales based on different measures of deprivation. The 'access to services' measure of deprivation is based on the average travel times, by both public and private transport, to a range of services including food shops, GP surgeries, primary and secondary schools, and sports facilities. It also considers digital connectivity of the area, by including the percentage unavailability of broadband within the measure. In terms of the 'access to services' measure, the local authorities with the highest proportion of small areas in the most deprived 10% in Wales were Powys (50.6%)⁴⁴ and Ceredigion (50.0%).⁴⁵ In addition, the Beguildy LSOA in Powys is ranked the second most deprived in Wales in terms of access to services.

Figure 18 shows the extent of the Mid Wales region that falls within the 10% most deprived category when considering access to services. The data reflects the rural nature of the region, dispersed settlement patterns, the need to travel longer distances to access key services, and the limited public transport options available. It shows that the challenge of rurality in Mid Wales has implications for accessing key services and amenities, which are often concentrated in the larger towns, and this leads to a greater dependence on travel by private car.

⁴⁴ [WIMD - Powys \(gov.wales\)](#)

⁴⁵ [WIMD - Ceredigion \(gov.wales\)](#)

Figure 18: WIMD 2019: Access to Services



The ability to access the key services is particularly important when considering the needs of the most vulnerable in society. People without access to a car may be excluded from accessing some job, leisure, and tourism opportunities. The impacts of a lack of transport choices on social isolation and loneliness were highlighted during stakeholder engagement, along with the social value of transport such as the impact of well-being. The impacts of inequality of access on certain groups of the population, such as younger or older people, was also highlighted during stakeholder engagement.

This severance issue is further heightened by the lack of public transport availability and connections offering direct routes to major healthcare centres. This issue also applies to local GP appointments whereby those who are unable to drive rely on public or community transport, or lifts from friends and family. A specific issue that was raised during stakeholder engagement was access to healthcare and the difficulties in accessing hospital appointments by public transport. There is no general district hospital in Powys, and reliable public transport and its role in providing access to healthcare and other services was emphasised amongst stakeholders. Problems in accessing to healthcare was also highlighted by the Powys Well-being Assessment, whereby *'residents must travel out of county, to other parts of Wales or over the border to England, to access certain types of health services. There are large differences in distances to a district general hospital throughout Powys. Residents of Beguildy LSOA have the furthest to travel. It would take approximately 86*

*minutes to arrive at their nearest district general hospital.*⁴⁶ The difficulties of travelling to Aberystwyth from Powys without a car was also highlighted during stakeholder engagement.

Issues in accessing healthcare could disproportionately impact older people and could become more of an issue in the future due to the ageing population. A lack of access to public transport means that older people who may not have access nor the physical capability of using a car forces a reliance on volunteer transport services, which are often unreliable. The Ceredigion Well-being assessment found that, the lack of adequate public transport was also high on the list of factors that determines well-being for many older and disabled people.

The Ceredigion Well-being Assessment also highlighted the issues for young people, whereby ‘for a young person being able to drive and owning a car can therefore be essential, but this comes with costs that young people often may not be able to afford. This can result in making travelling to see friends and socialising difficult, leaving some feeling lonely and isolated, which negatively affects their well-being.’⁴⁷ The importance of access to social activities for young people, in addition to work and education, was also raised during the RTP stakeholder engagement and seen as an important factor in retaining young people in the area.

The most at risk communities are those that are the most rural, where public transport services are infrequent/ non-existent, and the need to own and be able to maintain and operate a car are a necessity. Consequently, the need to keep rural communities well-connected to key urban centres/towns, but also to each other to mitigate the negative impacts of social isolation.

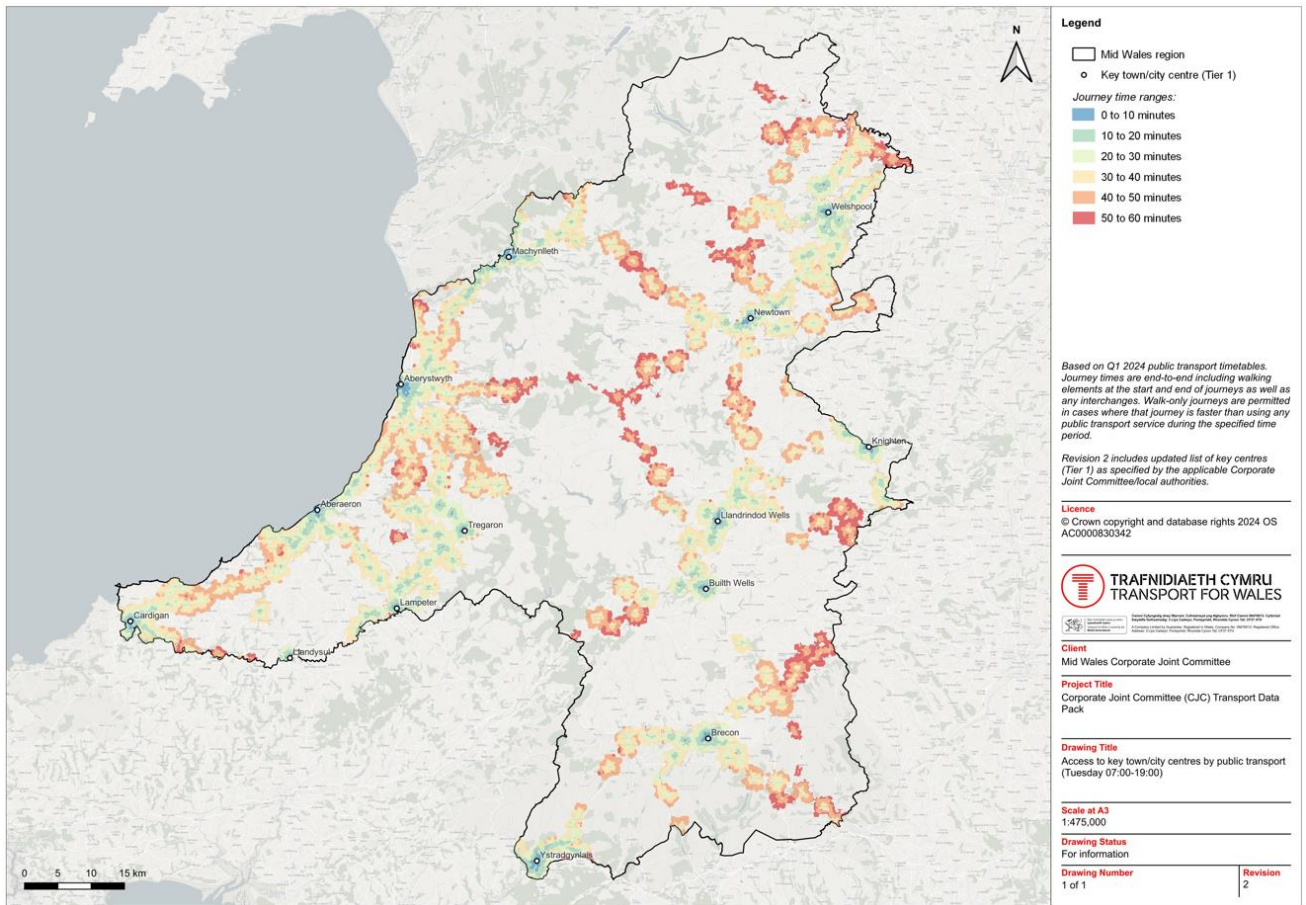
7.2 PUBLIC TRANSPORT JOURNEY TIMES

Figure 19 demonstrates accessibility to key towns and centres in Mid Wales in terms of journey time by public transport. Figure 19 shows that the key town/centres themselves and the immediate surrounding areas have within 20-30 minutes access to key centres. Further away from these key towns and centres, many smaller settlements in Powys and Ceredigion have 50-60 minutes access to a key town and centre via public transport. This highlights that many settlements in Powys and Ceredigion have poor access to amenities and facilities contained within these key towns and centres, which can have a significant on people’s physical and mental well-being, and particularly people’s access to healthcare, education, employment and leisure activities.

⁴⁶ Well-being Assessment – Powys Public Service Board, March 2022, pp. 41

⁴⁷ Ceredigion Assessment of Local Well-being, Ceredigion Public Services Board, 2022, pp.91

Figure 19: Access to Key Towns/centres via Public Transport (TfW)



In terms of journey times, accessibility by more sustainable travel options is less attractive than the equivalent journey by car. Such trends were also highlighted by the Ceredigion Well-being Assessment, states that *'the average return travel time by public transport to reach key services in Ceredigion, including healthcare and education, is 77 minutes which is 61% higher than the Wales average of 41 minutes. It is also significantly faster to reach these services by car (11 minutes in Ceredigion compared to 7 minutes in Wales)'*.⁴⁸

⁴⁸ Ceredigion Assessment of Local Well-being, Ceredigion Public Services Board, 2022

8 TOURISM

Tourism plays an essential part in the economic well-being of Mid Wales. The region is host to major tourist attractions and destinations, including Bannau Brycheiniog National Park and the West Wales coastline. During 2014-2016, Mid Wales accounted for 18% of overnight domestic (GB) trips, 10% of international visits, and 12% of day visits to Wales, with the industry employing 23,000 within the region.⁴⁹ In 2020, 13.2% of employment in Mid Wales was within a tourism-related industry.⁵⁰

Tourism relies on good connectivity and accessibility for those visiting the area and issues associated with transport links to and within Mid Wales may act as a barrier to increasing the growth of the tourism industry. Mid and West Wales have been identified as *'being particularly reliant on tourism and being significantly distant from existing strategic transport links,'*⁵¹ suggesting that despite the economic and social significance of tourism in Ceredigion and Powys, the existing transport infrastructure throughout the region hinders its growth.

Travel patterns from tourism in Wales demonstrate a reliance on car travel. In 2019, only 16% of trips to visitor attractions in Wales were made by public transport and 6% by walking. The majority of journeys to visitor attractions were made by car (68%).⁵² While regional data is not currently available, it is likely that poor public transport connectivity in the Mid Wales region as evidenced throughout the Case for Change does not provide adequate sustainable travel options for tourist or leisure trips. It is likely that the problems associated with public transport more generally, limits its usage by tourists and visitors to the region. Such issues include:

- A lack of service;
- Irregular service hours;
- Poor access;
- Digital connectivity; and
- Affordability.

The Bannau Brycheiniog National Park, which plays a significant role in Mid Wales' economy, provides an example of the issues relating to visitor access by sustainable transport. In 2019, the total economic impact of tourism of the National Park was estimated at £326 million and supporting over 4,000 FTE jobs⁵³. The area can be easily accessed by car via the A470, A479 and A40, which are connected further afield by the M4 and M50. In comparison, access by sustainable modes is more limited. The T4 bus service operated by TrawsCymru offers connections from Cardiff to Newtown via Brecon, and the T6 service offers connections from Swansea to Brecon. There are no direct bus services to Bannau Brycheiniog from outside of Wales or from North Wales. There is also

⁴⁹ A Vision for Growing Mid Wales – Strategic Economic Plan & Growth Deal Roadmap, May 2020

⁵⁰ Wales Visitor Economy: 2021, Welsh Government, 28 April 2022

⁵¹ Union Connectivity Review, Department for Transport, 2021, Page 32

⁵² [Subsidiary measure S6 | Transport for Wales \(tfw.wales\)](https://www.tfw.wales)

⁵³ STEAM Summary 2019 Brecon Beacons National Park, GTS, 2019

no railway station within the National Park, with the nearest stations being Merthyr Tydfil, Abergavenny and Llandovery,⁵⁴ which are located on the outskirts of the area. This shows that while Bannau Brycheiniog National Park has economic significance in Mid Wales as a tourist destination, access to the area by sustainable modes of transport is limited.

In terms of tourism trips, 39% of tourism day trips in Wales originated from England and 2% from Scotland in 2022. The remaining proportion travel from within Wales and primarily South East Wales. The majority of tourism from England originates from North-West England, the West Midlands and South-West England⁵⁵. Regional data is not currently available, but the data of the origin of trips to Wales demonstrates the importance of transport connectivity within Wales, as the majority of domestic trips, for both commuting and tourism, originate from South-East and South-West Wales. It also shows the importance of cross border connectivity as a large proportion of commuters and tourists travel from neighbouring regions in England.

Tourism in Mid Wales is seasonal with peaks and variations in travel demand throughout the year. It has been shown that peaks in travel demand from domestic tourism day visits occur from April to June where trip volumes and expenditures are highest.⁵⁶ This puts seasonal pressures on the transport network. Stakeholder engagement also highlighted issues around the seasonality of tourism and the provision of appropriate transport infrastructure. For example, if electric vehicle charging infrastructure is designed solely to meet the needs of the local population, this may create challenges during periods of peak tourist demand. In addition, tourists may need charging points in different locations to those living in the area.

⁵⁴ [Getting Here - Brecon Beacons National Park, Wales](#)

⁵⁵ Domestic GB Tourism Statistics (day trips in Wales): 2022, Welsh Government, June 2023

⁵⁶ Domestic GB Tourism Statistics (day trips in Wales): 2022, Welsh Government, June 2023

9 ENVIRONMENTAL CHALLENGES

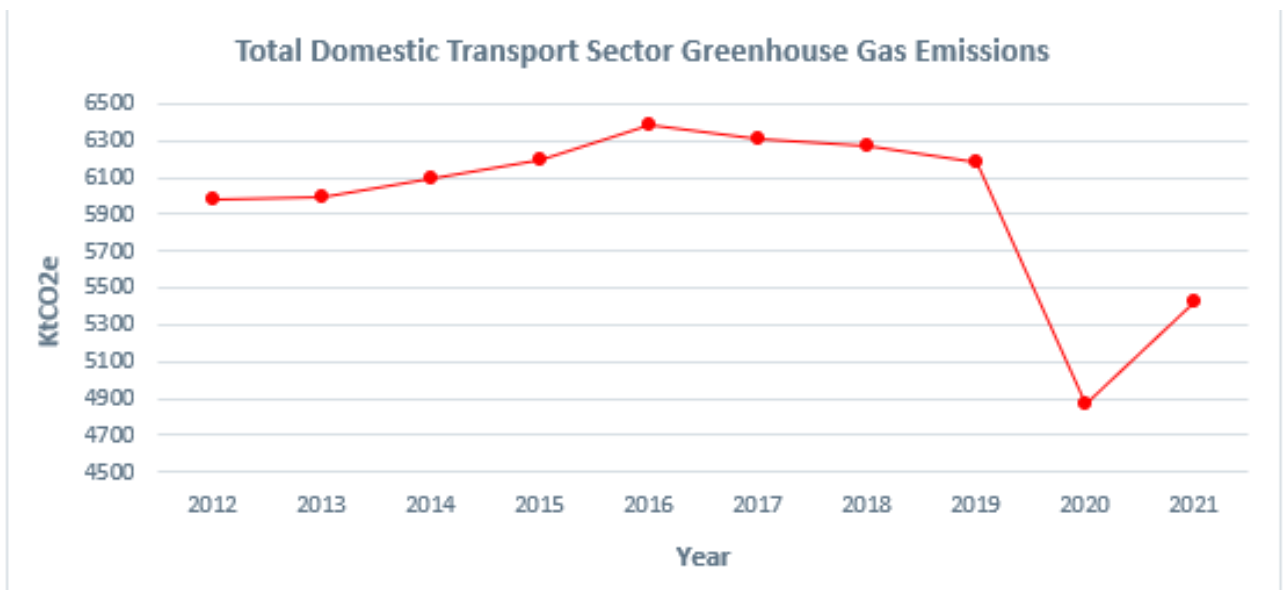
9.1 TRANSPORT AND THE ENVIRONMENT

The significant impact that transport has on the environment is widely recognised, particularly in terms of air pollution, noise pollution and greenhouse gas emissions. Through greenhouse gas emissions, transport contributes to global warming and climate change. Transport also has significant impacts on human health, nature and ecosystems, for example through the loss of habitats, emissions, noise and light pollution.

9.2 REDUCING CARBON EMISSIONS

In 2020, the transport sector was identified as the third largest emitter of greenhouse gases, behind only the energy supply and business sectors. Figure 20 shows levels of greenhouse gas emissions from the transport sector, which is a key WTS Monitoring Measure.⁵⁷ In 2021, the domestic transport sector produced 14.9% (5,421 kilotonnes of carbon dioxide equivalent (KtCO_{2e})) of Wales' total KtCO_{2e}. The reduced levels when compared to previous years is likely to be due to the effects of the coronavirus pandemic.

Figure 20: Total Domestic Transport Sector Greenhouse Gas Emissions (2012 -2021)

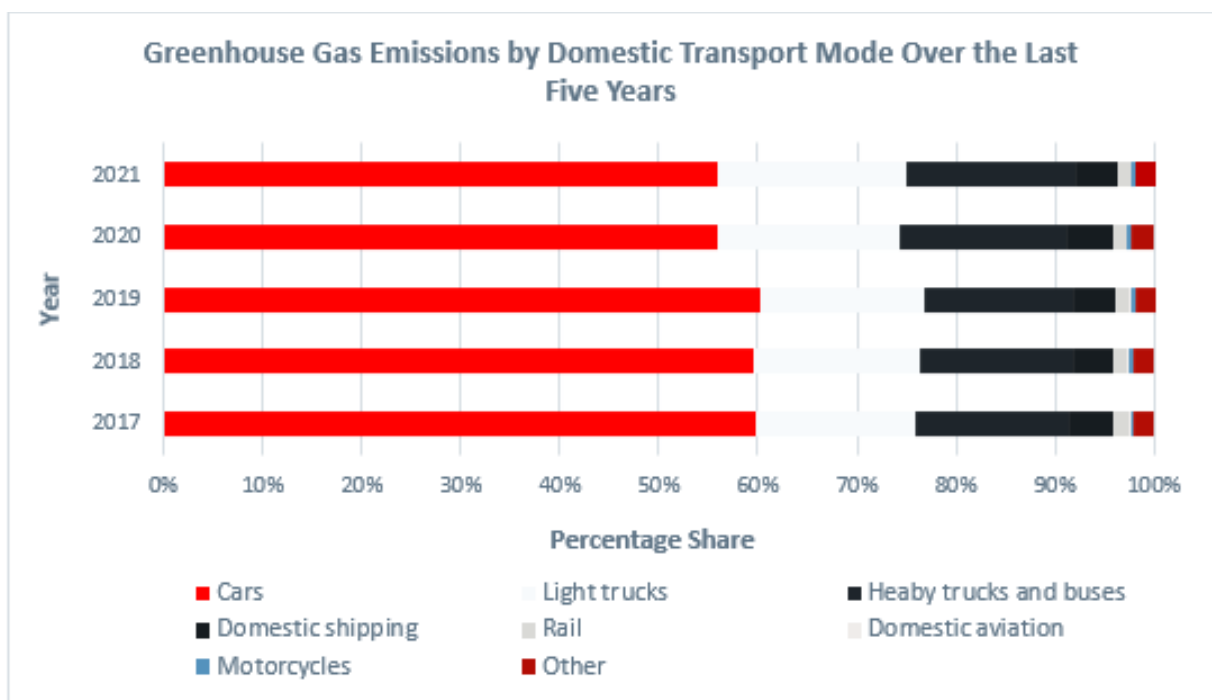


⁵⁷ [Key Measure M6 | Transport for Wales \(tfw.wales\)](#)

The Local Area Energy Plans for Powys and Ceredigion show that approximately 16% of greenhouse gas emissions in 2021 (CO₂ equivalent) in both Powys and Ceredigion came from transport.⁵⁸ This figure includes local authority A roads and minor roads, but not trunk roads.

Figure 21 shows the percentage share of greenhouse gas emissions by domestic mode over the last five years.⁵⁹ In each of the years shown, car is responsible for the majority of greenhouse gas emissions in Wales from the transport sector (56% in 2021). At a regional level, this reflects the high levels of car use and high reliance on private car for all journeys in Mid Wales.

Figure 21: Greenhouse Gas Emissions by Domestic Transport Mode Over the Last Five Years



In 2021, Senedd Cymru approved a legally binding net zero target for 2050. To achieve net zero, a number of five-year carbon budgets have been set. The second Carbon Budget 2 (2021-2025) requires a 37% reduction in emissions compared to 1990 levels and Carbon Budget 3 (2026 – 2030) will require a 63% reduction. Net zero targets are reflected in the Wales Transport Strategy and are supported by the modal shift target of 45% of journeys to be made by public transport, walking and cycling by 2040. A reduction in the number of journeys by car in Mid Wales will be vital to reducing emissions and working towards Wales’ national targets and contributing to international efforts to mitigate the impacts of climate change.

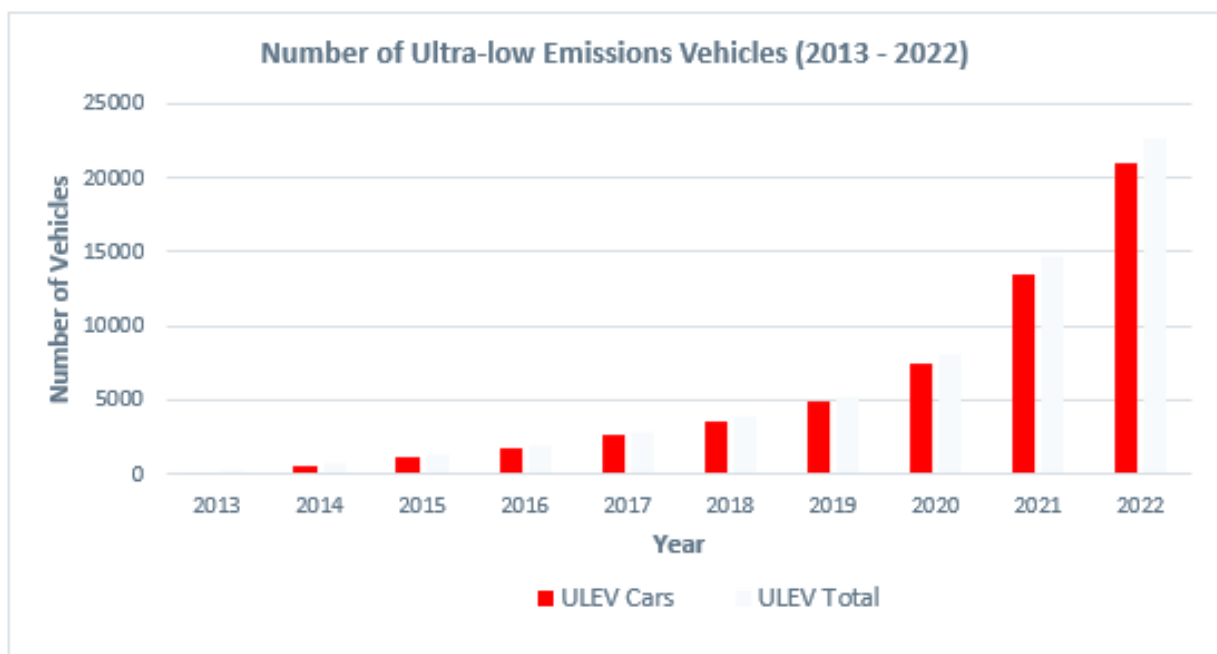
⁵⁸ Powys: Local Area Energy Plan and Ceredigion: Local Area Energy Plan, 2024

⁵⁹ [Key measure M6 | Transport for Wales \(tfw.wales\)](https://www.tfw.wales/)

9.3 LOW EMISSIONS VEHICLES

In rural Mid Wales, the uptake of low emissions vehicles will be important in working towards net zero. The percentage of vehicles that are ultra-low or zero emission is a key WTS Monitoring Measure and shows that ultra-low or zero emission vehicles accounted for a 1.1% total of road vehicles in Wales in 2022.⁶⁰ This represents 1.3% of cars, 1% of buses and coaches, and 0.9% of taxis and private hire vehicles this share is 0.9%. Similarly the Local Area Energy Plans for Powys and Ceredigion show that 1% of vehicles in both Powys and Ceredigion are purely electric.⁶¹ Despite the low overall share of vehicles, Figure 22 shows that ultra-low emission vehicles (ULEVs) have grown in number since 2013, with growth rates of 54% in 2020 and 81.1% in 2021.

Figure 22: Number of Ultra-Low Emissions Vehicles (ULEVs) from 2013 to 2022



Developing a comprehensive network of charging points will be essential to increasing the uptake of electric vehicles (EVs). The vision of the Electric Vehicle Charging Strategy for Wales is that, 'by 2025, all users of electric cars and vans in Wales are confident that they can access electric vehicle charging infrastructure when and where they need it', but the strategy found that Wales has less than 1% of the total number of fast chargers that are predicted to be needed by 2030 (30,000 to 55,000).⁶²

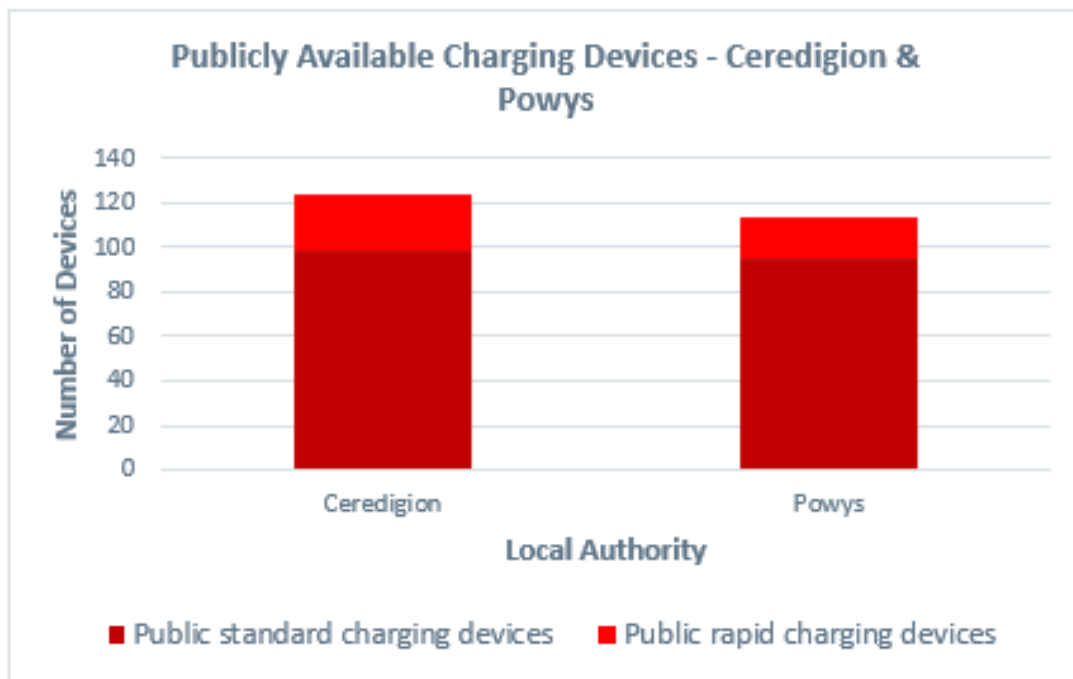
⁶⁰ [Key measure M2 | Transport for Wales \(tfw.wales\)](#)

⁶¹ Powys: Local Area Energy Plan and Ceredigion: Local Area Energy Plan, 2024

⁶² [Electric Vehicle Charging Strategy \(gov.wales\)](#)

The Figure below shows the number of publicly available electric vehicle charging points in the region, which is a WTS Monitoring Measure.⁶³ In total, Ceredigion currently has 124 publicly available charging devices for electric vehicles, while Powys has 114. Pembrokeshire is the local authority in Wales with the highest number of publicly available charging devices (200). In terms of charging devices per 100,000 population, Ceredigion has 175.5 and Powys has 85.4. Of all LAs in Wales, Ceredigion has the highest number of chargers per 100,000 population, which partly reflects the low total population than other areas.

Figure 23: The number of publicly Available Charging Devices in Ceredigion and Powys (as of January 2024)



9.4 RESILIENCE OF TRANSPORT INFRASTRUCTURE

Transport and its environmental challenges are very closely linked, whereby transport both impacts and is impacted upon by environmental issues such as climate change. As well as its role in producing greenhouse gas emissions, the transport network is likely to be adversely affected by climate change through more frequent flooding, erosion, higher temperatures, high winds and lightning⁶⁴.

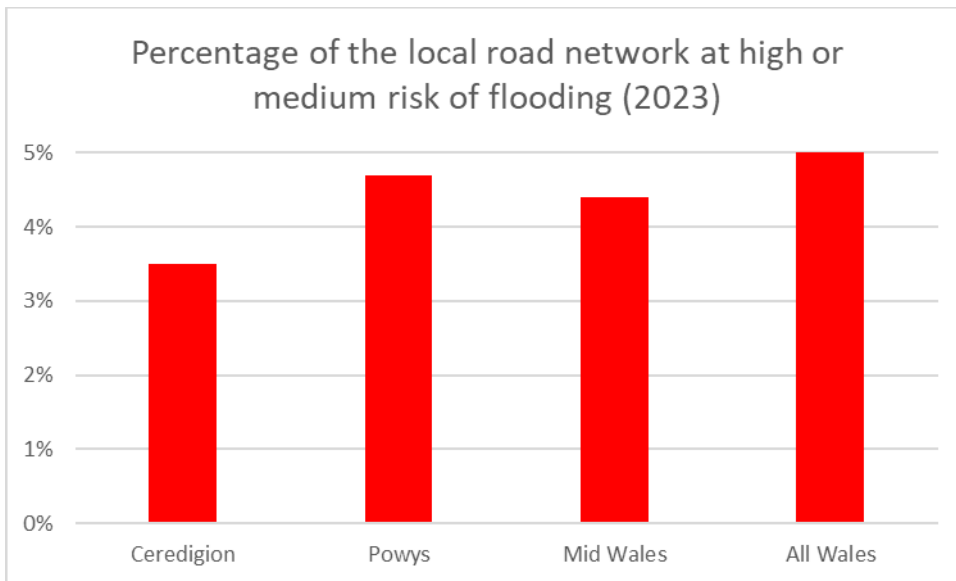
⁶³ [Key measure S10 | Transport for Wales \(tfw.wales\)](#)

⁶⁴ Well-being Assessment – Powys Public Service Board, March 2022

The future resilience of the transport network is crucial to all the themes considered in this Case for Change. In Mid Wales, and across Wales, there are increased risks to the resilience of the transport network due to the impacts of climate change, which includes flood risk.

Figure 24 shows the percentage of the local road network at high or medium risk of flooding, which forms part of a WTS Monitoring Measure.⁶⁵ It shows that 4.4% of the local road network in Mid Wales is at risk of flooding, which is lower than Wales as a whole (5.0%). Within Mid Wales, Powys has a greater proportion of the local road network at risk of flooding than Ceredigion.

Figure 24: Percentage of Local Road Network at High or Medium Risk of Flooding (2023)



Issues linked to weather events were raised during stakeholder engagement, in terms of the impact of flooding in disrupting transport. It was highlighted that weather extremes can have a major effect on the region’s transport infrastructure in terms of cancelled services and damage from flooding or landslips, and that problems due to adverse weather are likely to worsen in the future.

9.5 ROAD SAFETY AND HIGHWAY MAINTENANCE

The impact of road safety incidents on the strategic highway network was also raised during the stakeholder engagement. In terms of safety of the road network, Powys had the highest number of KSI (killed or seriously injured) road collisions in 2022 all the Wales local authorities.⁶⁶ The actual and perceived safety of the rural highway network, e.g. narrow roads and a lack of footways, is likely influence travel choices in rural areas and be a limiting factor in levels of walking and cycling.

⁶⁵ [Subsidiary measure S22 | Transport for Wales \(tfw.wales\)](#)

⁶⁶ [Recorded road accidents by severity and area \(gov.wales\)](#)

Stakeholder engagement highlighted the impact of road safety incidents in terms of road closures and the diversion of traffic onto the local road network. This causes journey delays, e.g. to public transport, freight, and tourism, which can have knock-on effects to the Mid Wales economy.

Poor condition of the highway network can also have an impact on safety. The importance of a well-maintained highway network from a road safety perspective was also raised during stakeholder engagement, e.g. in terms of the provision of a highway network that strives to reduce collisions and targets the cause of collisions, e.g. through the provision of places for drivers to rest when tired.

The provision of a safe, accessible, and well-maintained transport system is vital for the region. The importance of ongoing maintenance of the highway asset, as well as improving the standard of the highway network was raised during stakeholder engagement. The sustainability of the highway network to the future of the region was seen by stakeholders as important to many of the issues raised in this case for change, e.g. ensuring accessibility to services, enabling a public transport network. Similarly, the Ceredigion Well-being Assessment highlights that 'High quality road networks are key to enabling well-connected communities, they provide access to services, employment, training and recreation'.⁶⁷

Figure 25 shows the percentage of A roads (local authority county roads) in poor condition.⁶⁸ This data relates to the WTS Monitoring Measure that monitors the percentage of transport infrastructure in good condition.⁶⁹ It shows that the percentage of A roads in poor condition in Mid Wales, as well as Wales as a whole, has increased between the years 2016-17 to 2018-19. Powys and Wales as a whole have seen marginal increases of 0.3% and 0.2% respectively, whereas Ceredigion has seen a larger increase of 0.5%. Within Mid Wales, Ceredigion has a higher proportion of A roads that are in poor condition, and in 2018-19, 4.7% of the local-authority A roads in Ceredigion were in poor condition.

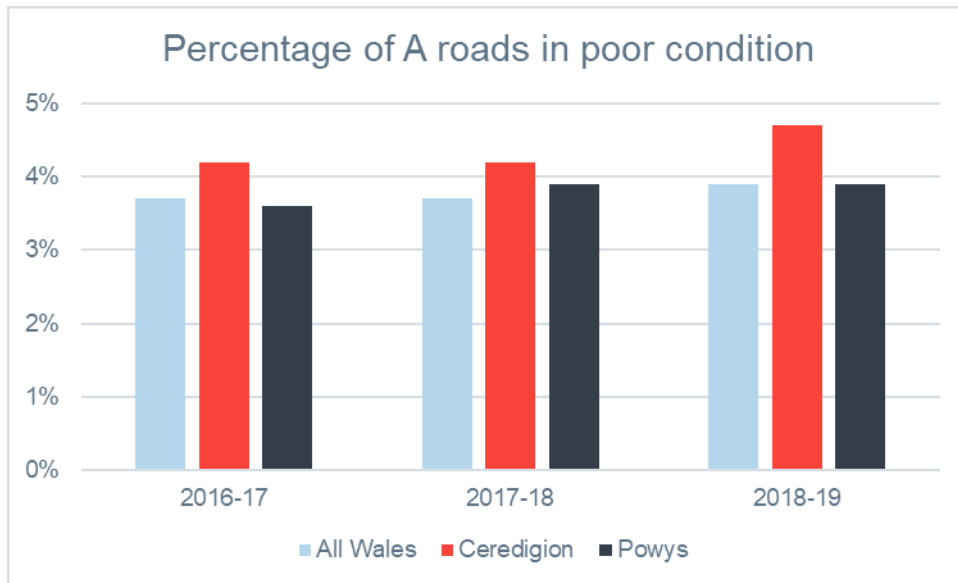
It should be noted that issues are not limited to the local authority's road network, as there is a significant trunk road network in Mid Wales. Stakeholder engagement highlighted the importance of ongoing maintenance of these strategic highway assets for all users.

⁶⁷ Ceredigion Assessment of Local Well-being, Ceredigion Public Services Board, 2022, pp. 120

⁶⁸ [Percentage of local authority road network in poor condition by road type and year \(gov.wales\)](#)

⁶⁹ [Subsidiary measure S21 | Transport for Wales \(tfw.wales\)](#)

Figure 25: Percentage of local authority A roads in poor condition



10 CONCLUSION

This Case for Change has set out the key issues for transport in the Mid Wales region. It has discussed regional challenges in relation to:

- Rurality;
- Economic connectivity;
- Car dependency;
- Public transport;
- Active travel;
- Access to Services;
- Tourism;
- Carbon emissions;
- Resilience of the transport network; and
- Road safety.

The issues identified in this Case for Change will inform the development of the Mid Wales RTP vision and objectives. These will set out what the RTP aims to achieve, in order to address the issues identified in this Case for Change, as well as the priorities and ambitions of the Wales Transport Strategy.

This Case for Change has been informed by a range of national and local data sources. Future work to develop the Mid Wales RTP policies and projects will continue to be informed by regional data as it becomes available, e.g. mobile phone data to identify key origin and destination across the region. This will ensure that all stages of RTP development are supported by a strong evidence base.



1 Capital Quarter
Tyndall Street
Cardiff
CF10 4BZ

wsp.com