



Pobl ifanc a thrafnidiaeth: digwyddiad Caerdydd **Young people and transport: Cardiff event**

24 Ionawr / January 2019



William Powell

Board Member for Wales, Transport Focus



Russell George AM

Chair, Economy, Infrastructure & Skills Committee
National Assembly for Wales



Louise Coward
Acting Head of Insight,
Transport Focus



David Beer
Stakeholder Manager for Wales,
Transport Focus

Transport Focus – evidence based consumer organisation

Independent consumer watchdog promoting the interests of transport users across Great Britain

Using evidence from our research to give voice to passengers' issues and priorities for improvement; informing our work with service providers across the industry

Key results come from our major tracking surveys:

National Rail Passenger Survey

- Runs in two waves each year – spring 2018 was the 38th consecutive wave – with results from over 50,000 passengers each year
- Nearly 2,100 responses from Arriva Trains Wales passengers

Bus Passenger Survey

- 2017 was the eighth annual survey – first GB-wide survey – opinions from nearly 48,000 passengers of the journey they were making
- Nearly 5,000 responses across Wales, thanks to funding from Welsh Government and main operators and the support of Bus Users Cymru

These lead to further in-depth studies – more details on our website or from our stand at the back of the hall



National Rail Passenger Survey – station facilities

Younger ages have lower satisfaction – especially information, upkeep, cleanliness and WiFi

National Rail Passenger Survey: Arriva Trains Wales Combined results: Autumn 2016 to Spring 2018	Total All ages	16-18 % satisfied	19-25 % satisfied
Overall Journey satisfaction	82	75	75
STATION FACILITIES			
Overall satisfaction with the station	75	69	74
Ticket buying facilities	76	75	77
Provision of information about train times/platforms	83	70	80
Upkeep/repair of the station buildings/platforms	67	56	62
Cleanliness	71	59	61
Attitudes and helpfulness of the staff	78	70	69
Connections with other forms of public transport	62	60	66
Your personal security whilst using the station	70	65	68
Shelter facilities	69	68	68
Availability of seating	58	52	53
Choice of shops/eating/drinking facilities available	41	39	36
Availability of Wi-Fi	29	24	18

RED = lower by 10% or more

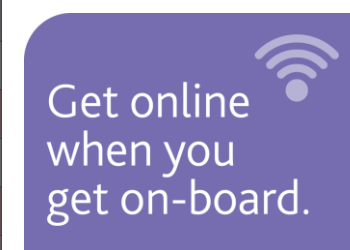


National Rail Passenger Survey – on-board facilities

Younger also lower satisfaction – with frequency, value for money, information, and devices

National Rail Passenger Survey: Arriva Trains Wales	Total	16-18	19-25
Combined results: Autumn 2016 to Spring 2018	All ages	% satisfied	% satisfied
TRAIN FACILITIES			
Overall satisfaction with the train	75	77	70
Frequency of the trains on that route	72	69	62
Punctuality/reliability (i.e. the train arriving/departing on time)	79	78	69
Length of time the journey was scheduled to take (speed)	83	85	75
Connections with other train services	72	67	68
Value for money of the price of your ticket	56	38	43
Upkeep and repair of the train	65	68	59
Provision of information during the journey	63	63	56
Helpfulness and attitude of staff on train	84	73	79
Your personal security on board	77	71	75
How well train company deals with delays	37	55	34
Usefulness of information during delay	40	49	23
Level of crowding**	70	63	65
Reliability of the Internet connection***	45	38	38
Availability of power sockets**	22	15	17

RED = lower by 10% or more



Bus Passenger Survey – included Wales in 2017

Similar lower satisfaction – with journey time, punctuality, value for money and the bus driver

Bus Passenger Survey: Wales	Total	16-18	19-21	22-25
Headline measures – Autumn 2017	All ages	% satisfied	% satisfied	% satisfied
Overall satisfaction with journey	90	81	84	81
Satisfaction with journey time	86	69	77	76
Punctuality of the bus	76	62	72	63
Satisfaction with value for money (fare-payers only)	64	59	57	52
Bus driver greeting/welcome	81	61	76	75
Interior cleanliness/condition	84	68	78	77
Availability of seating or space to stand	88	72	89	87

RED = lower by 10% or more



Key points from the Bus Passenger Survey

Prompting in-depth research with young people

- **Value for money** depends on delivering the basics consistently as well attractive fares and season tickets
- **Punctuality is key** – work together to alleviate congestion and speed up journeys, especially for the afternoon peak
- **Good quality information** to support services before, at stops and during the journey – especially audio/visual, real-time and fares
- **Attention to the environment** – at stops and on-board



Most of all...

- **Bus driver customer service** is crucial to passenger satisfaction and delivering a great journey

Also supported by issues from NRPS, creating a picture of young people's needs across public transport



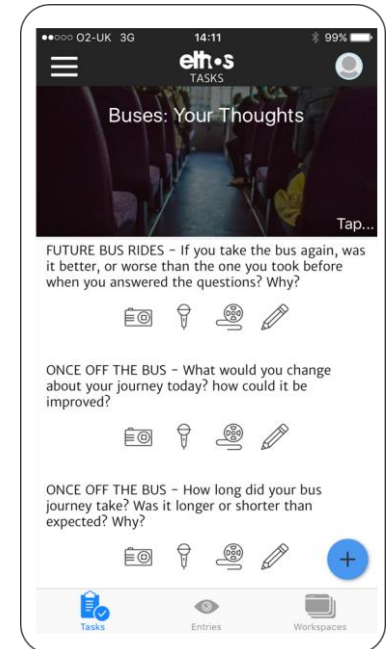
Using the bus: what do young people think?

Louise Coward, Acting Head of Insight
24 January 2019

Objectives

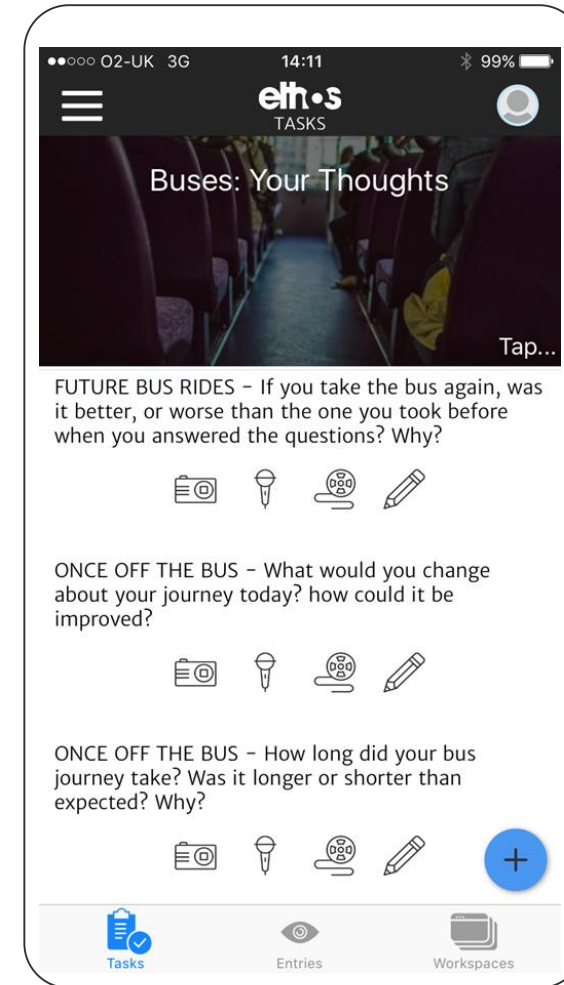


- Planning a journey
- Views on transport options
- How do young people use buses now?
- What are their views on bus services?
- How can bus services become more attractive to young people?
- How will bus use change and why?



Overview of Method

- Mixed method approach, fieldwork conducted February – March 2017
- Detailed qualitative fieldwork – **64 participants**:
 - Pre-task: bus journey, with mobile app to record views/photos
 - 8 Face-to-face focus groups
 - Urban x2: Leeds, Solihull and x2 rural: Norwich, Shenfield, Essex. Each had two groups: 14-16 year olds and 17-19 year olds
- Quantitative online survey of **1,000 14-19 year olds**
 - Mix of status: school, college, uni, working, other
 - Demographics representative of census, weighted by age, gender, region
- Worked with independent specialist youth researcher, Laura McLarty 4D research



Planning a journey is a two stage process

What is **most convenient and quickest** for me?

“I would bike up to park & ride, lock my bike up and then hop on the bus, because that is cheaper than getting a bus the whole way. It's only 80p vs £2 on First Buses”. (Norwich, 14-16s)

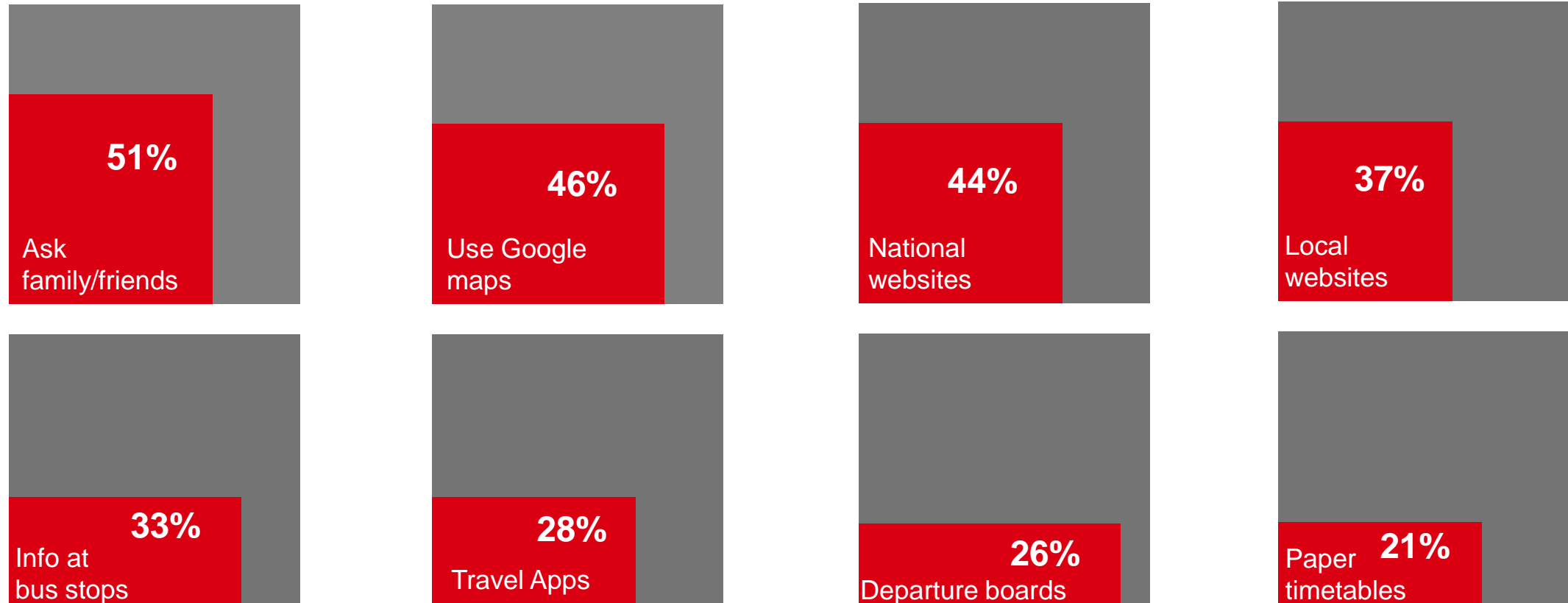
“It depends how much longer it takes. If it doesn't cost much more, but gets there much quicker, then I would go for that”. (Essex, 14-16s)

How much will this cost me?

“If my parents take me then that just seems easier than having to time it all”. (Essex, 14-16s)

“I would think about cost of parking, so if I was going to town for a full day, it would cost about £15 to park, so would be better to get public transport”. (Leeds, 17-19s)

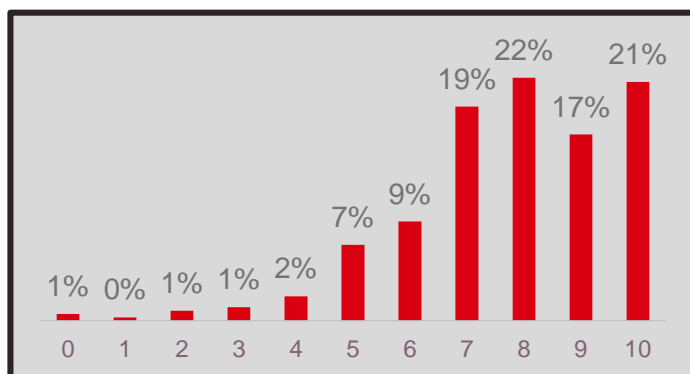
Information from Google Maps and family/ friends



Q5) How do you find information about your journey/plan how you are going to get somewhere – Journey planning?
Base: all (1003)

Broadly positive about public transport

79% agree “Public transport...is **essential** for helping **everyone** get where they want or need to go”



Q6) To what extent do you agree with the following statements about public transport?
Base: all (1003)

...needs **more investment**” **75%**
...meets **my needs** well” **61%**
...is good for **environment**” **57%**
...is for people **without a car**” **56%**

Available alternatives

Driving / car share

- Value is significant – implies freedom – can go wherever and whenever
- It's a 'no-brainer'
- Consider cost of parking & petrol, but don't outweigh the independence of your own car
- Benefit of car share with friends, a group activity & cheaper

In rural areas, more willing to walk or cycle for longer distances to get into city/town, before consider other transport methods

- Up to 2-3 miles
- Some are using these methods for getting to school/college/work
- This is normal for them, so not questioned - it's 'just a way of life'
- Offers personal freedom set off and leave whenever choose

Uber

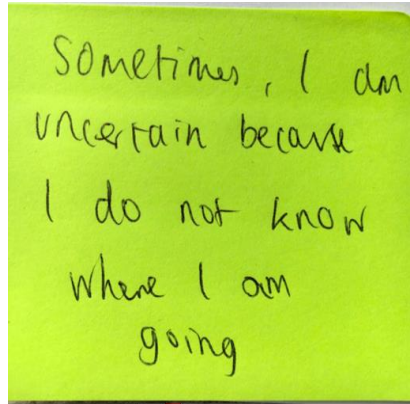
- Real pull for older ages (17-19s)
- So convenient – can see who is in area, can book them in and pay before travel
- No interactions required
Even though it's more expensive, some would use this as a first choice if available, as it's so easy
- Good awareness of Uber (14-16's)
Not desperate to try it – doesn't factor in their lives just now
- Rural –aware but not available, so don't feel they are missing out

In urban areas, think about walking, but less committed

- How long would it take to walk? Perhaps more frequently – how long to walk to bus stop or station?
 - Varies from 15-30 minutes

Immediate thoughts on public transport

- **Overcrowded** – lots of other people around
- Have to **mix** with other members of **the public**
- Convenient
- Quick
- Can be **expensive**
- Trains vs buses
- Waiting
- Provides **freedom** to those who are old enough to travel without parents
- For people not old enough to drive/don't own a car



Sometimes, I am
uncertain because
I do not know
where I am
going

“You don’t want to sit somewhere that is dirty, because you won’t want to rest your arms anywhere”.

(Norwich, 14-16s)

“On a train you know no one will speak to you, because its like an unsaid rule, but on a bus you are more nervous that someone might speak to you, it’s a bit weird that this person I have never met thinks they can have a conversation with me”.

(Essex 14-16s)

“[public transport gives me] Confidence, because you are getting used to travelling on your own”.

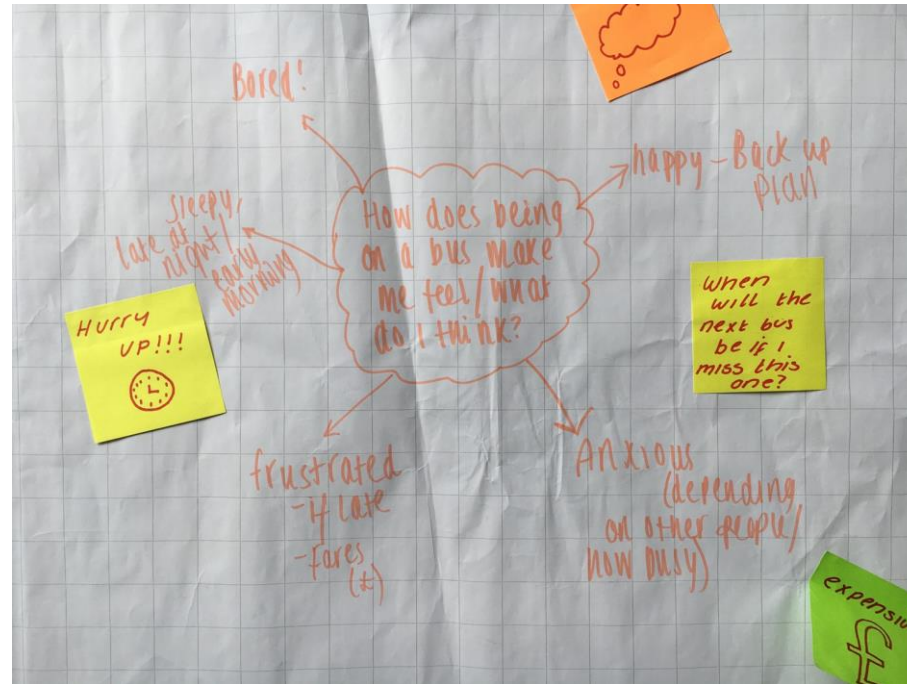
(Essex, 14-16s)

Immediate thoughts on buses

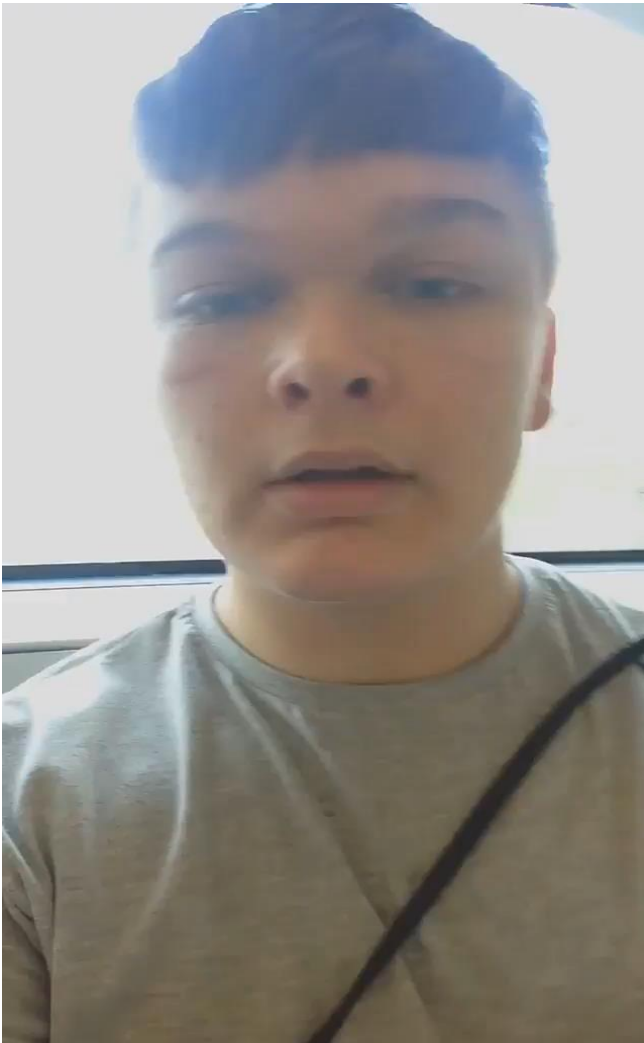
- Overcrowded
- Dirty
- Unreliable
- Weird people
- Grumpy bus drivers
- Having the right change
- Rattling buses, loud
- Unsafe driving
- A 'last resort'

Freedom and fragility

uncertainty and 'what ifs'



Generally supportive of bus network



But some frustrations

“Having a good bus network is important for the local area”

85% agree

“Travelling by bus is a good way to get about”

74% agree

“Buses are the cheapest way of getting to places”

42% agree

Bus users have more positive views

Many pictures – cleanliness is noticed



The role of 'freedom' and gaining independence

- Around 14/15yrs – starting to use different transport without parents. Gaining **independence**
 - Real appeal and like the idea of relaxing, talking to friends, enjoying the journey
 - Initial experiences inform development of attitudes towards buses & difficulties resonate for a while – not easily forgotten
- Getting the bus is a **core life skill** have to learn
 - Early experience can deter future use
- **Real fear factor: want to 'get it right' and not look/ feel silly**
 - How do I get there or find out best bus or route?
 - How do I catch the bus? Where is the stop? Is it safe?
 - How do I know what time will my bus arrive? What if it is late?
 - What do I say to bus driver? What fare am I asking for?
 - How much will it cost me? What if I get it wrong and asked to get off bus?
 - How will I know where to get off? What time are the buses coming back?

“The independence is a big one, being able to get the train and bus on their own is quite cool for young people who are still too young to drive”.

(Essex, 17-19s)

Awareness of fares: what and why?

- Real confusion as to: **what fares they should ask for** and **how much these cost**
 - What are these fares called? What am I eligible for if under 16, under 18?
 - If I have a pass in the week, can I use this at weekends?
 - Does one operator charge more than others?
 - Why does the cost keep changing? What are the factor influencing this?
- Why do I have to pay adult fare at weekends if I have a child pass?
- Reported lack of information as to probable fare
- Limited recall of discounts or offers promoted by bus companies
 - However seen them for students, OAPs
- Ads reported on back of buses, inside the interiors and on tickets
- Usually seen as something targeted at others 'not for them' so don't feel their business is wanted

Expense



"You don't really know how much it will cost until you get on the bus, there is nothing to tell you how much it will be".

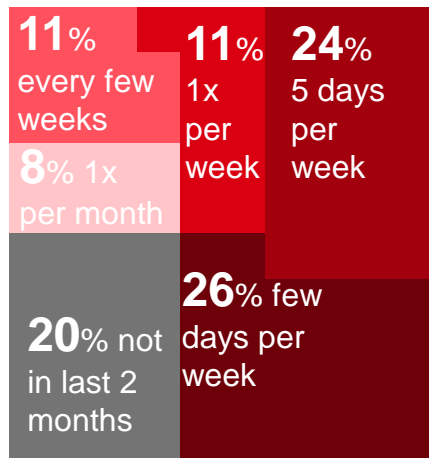
(Essex, 14-16s)

"I think my bus pass for a month would be about £48, which would mean I would get 2 weeks of the month free, but I don't know how to go about getting it. It says the prices online, but doesn't tell me how to get it".

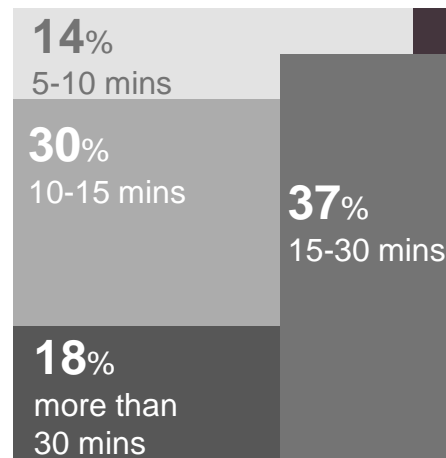
(Norwich, 17-19s)

50% use bus a few days each week

Frequency of bus use



Length of typical journey



Bus travel spend and ticket type

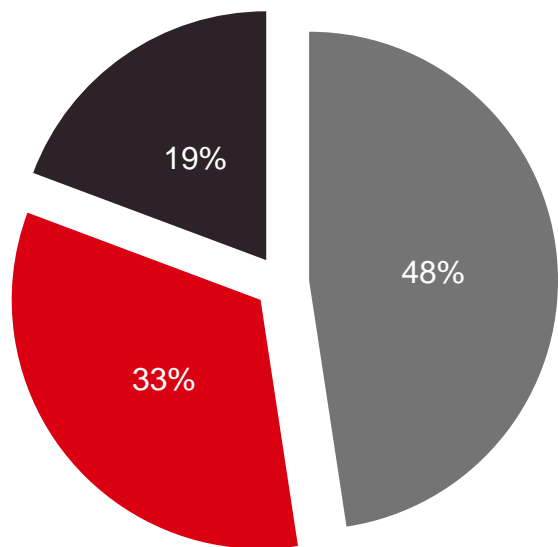
52% buy tickets each **day**
19% have **weekly** pass
9% have **monthly** pass
8% have **termly** pass
12% have **annual** pass
A **quarter** spend more than **£10** per week

“Having a good bus network is important for the local area” **85%** agree

“Travelling by Bus is a good way to get about” **74%** agree

“Buses are the cheapest way of getting to places” **42%** agree

Many young people not sure about special fares

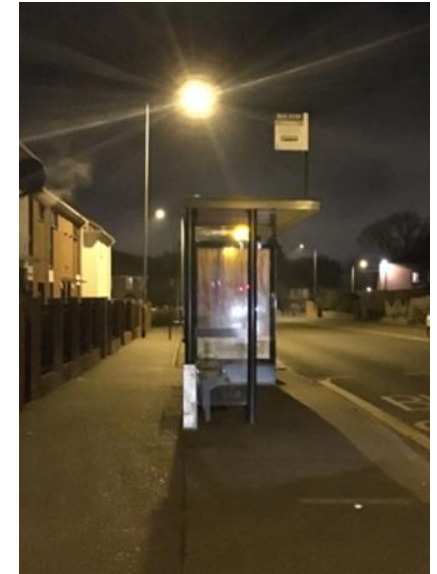


- I know that there is a good range of special fares and discounts for young people like me in my area
- I think there are some good fares and discounts for young people but I'm not sure of the details
- I'm not sure whether there are special fares and discounts for young people

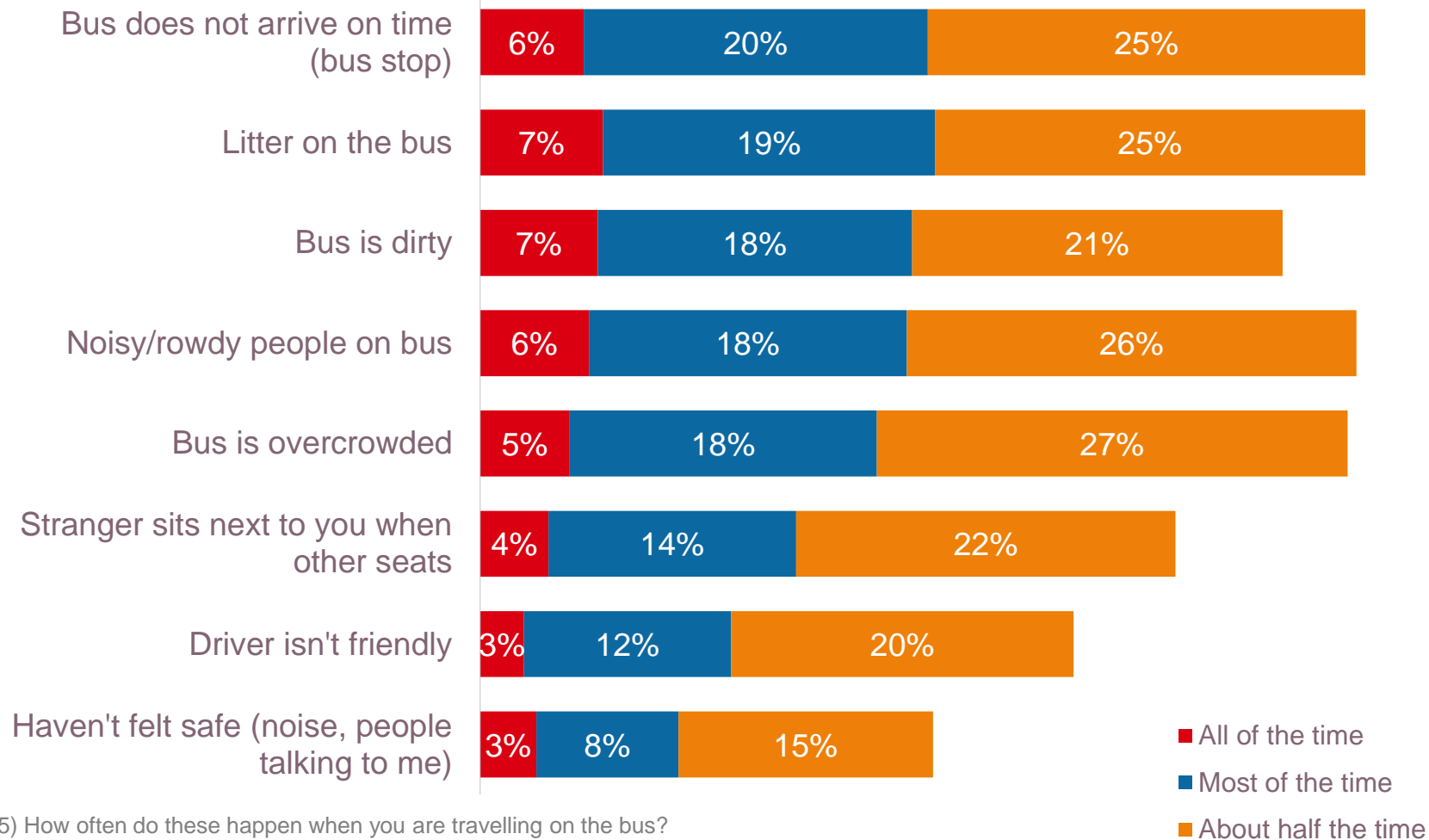
- **48%** feel there are a good range of fares and discounts –positive?
- Other half are unsure as to the details or don't know if these offers are available to them
- Important, considering how just over one third (35%) of survey respondents pay for fares from their own pocket money/money they have earned

The experience starts at the bus stop

- Negative comments about **condition of bus stop and facilities**:
 - Dirty/rubbish lying around/defaced timetables – can't read
 - Frustration where it is just a pole with a sign on it
 - No roof/poor lighting/no live tracker board/no seats
- Will my bus turn up?
 - What if late – what do I do? How do I find out where bus is, why delayed and what time it will get here?
 - A few checking operator apps– **space on mobile is precious and value of app has to be 'earned'**
 - Bus driver drives past them (doesn't stop)
- Getting on the bus
 - Initial experience can impact on the whole journey
 - Very much focussed around interface with the bus driver
 - Asking/paying for ticket: will the bus driver understand?
 - Finding a seat: how busy/noisy is it? Am I comfortable?
- Once on the bus
 - Dirty seats and litter make them feel uneasy
 - Pleasant if bus turns up, friendly driver, spare seats...
- What if it's delayed?
 - Can I see why there's a delay or track progress?



The experience is regularly disappointing



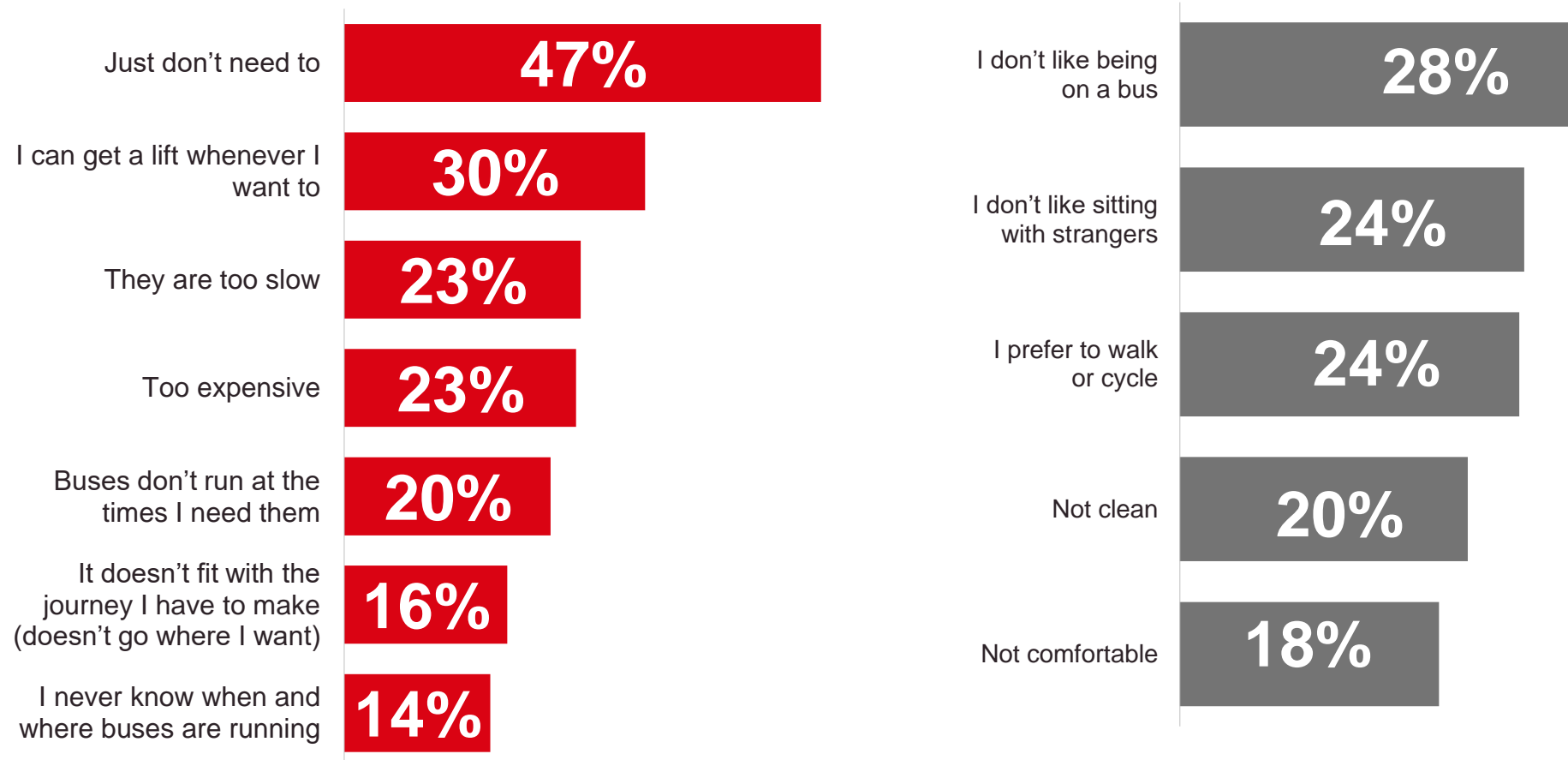
Q15) How often do these happen when you are travelling on the bus?
Base: Bus users (807)



Want to spend time on the bus 'usefully'

- **Listening to music** (practically everyone mentioned this)
- **On social media** – twitter, Instagram, snapchat
- **Talking with friends** on the bus
- **Browsing other sites**
- Charging their phones if have device chargers
- **Looking out of the window** (when listening to music)
- Younger participants can be quite happy to just **look out of the window** if a short journey (10 minutes)
- Older groups were far less willing to do this and would rather distract themselves as much as possible from the fact that they are on the bus
- Few mentioned working/preparing for school or college
- Even when bus has WiFi, can be a fairly slow connection, not fast enough to really get anything done

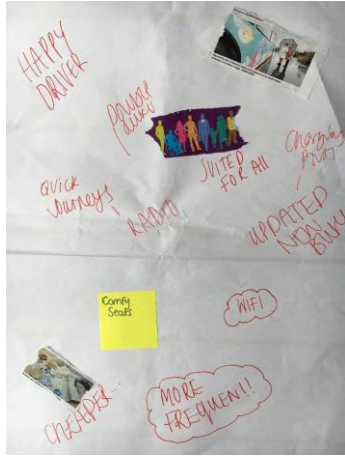
Reasons for not using the bus



Q20) What are your reasons for not using the bus?
Base: non-bus users (196)



Key features of the perfect bus journey



“Clean, on time, drivers that greet you, maybe something to do on the bus like the Metro and more reliable, make sure it’s on time every time”.

(Leeds, 17-19s)

- Main things are:
 - **Reliability of buses** (turning up on time)
 - **Clean seats and floors**,
 - Comfortable seats (leather effect)
 - Friendly bus driver – smile and say “hello”
 - Device charge points
 - Fast WiFi (fast enough to stream music)
 - Better legroom
 - Newspapers?
- However, this in itself is not enough
 - It is also about **communication** of how easy and useful a bus journey can be
 - Digital display boards/live trackers

“Would be nice to have something that tells you where you are or when you are getting to a certain bus stop because I had to look on Google Maps on my phone, or at least for it to say the name of the bus stop at the actual stop”. (Essex, 14-16s)

“Air conditioning, charging USB ports, comfortable seats, more room for people standing, and more rails, carpeted floor so it’s not slippery when it gets wet, and cleaned thoroughly throughout the day. More seating at the bus stop with a shelter ...”

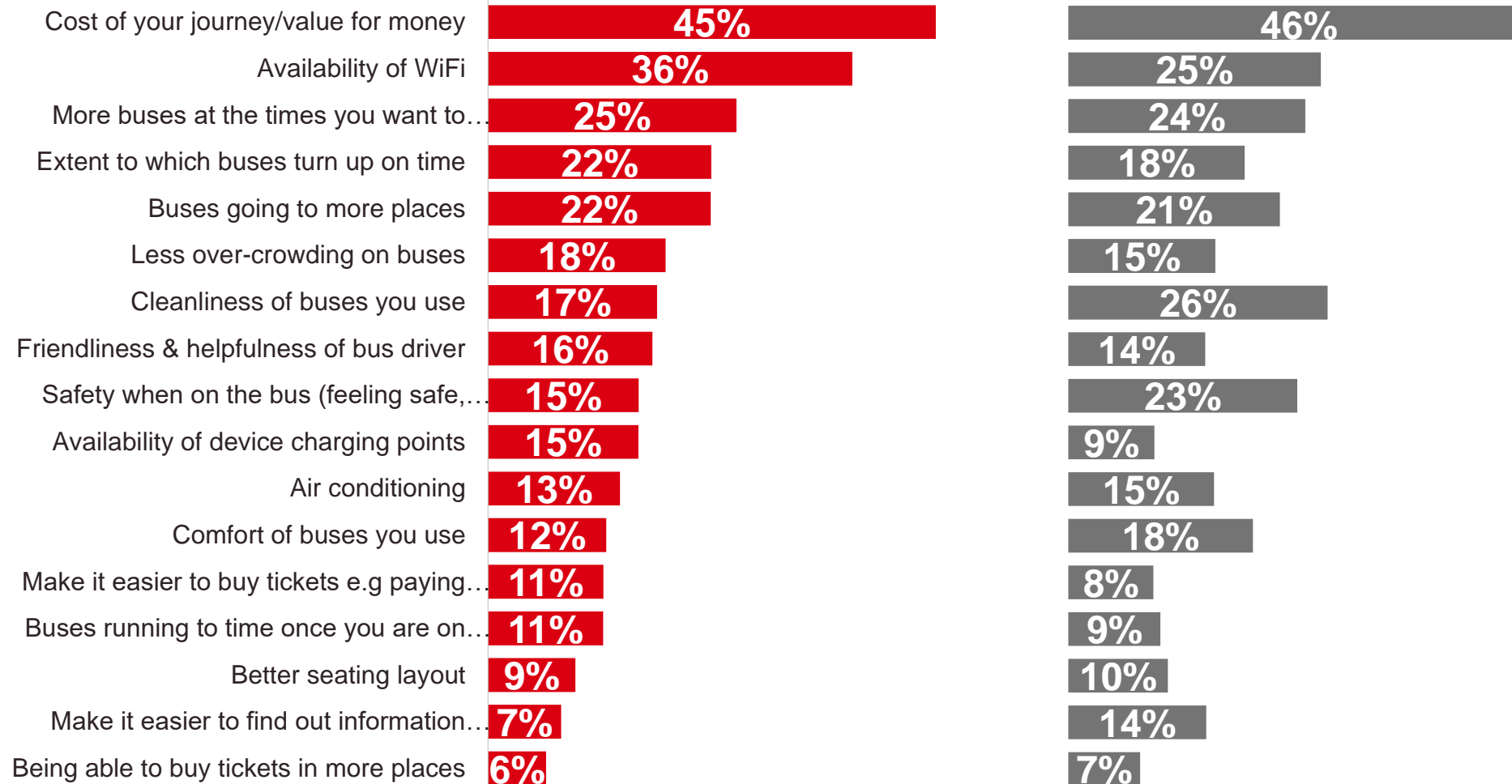
(Solihull, 14-16s)



Perceptions of operators

- Operators are **making an effort** to make bus journeys a more pleasant experience for everyone. However:
 - General perception that operators are not doing enough to: **a) offer them something that is ‘for them’**; and **b) actually ask them what services and facilities they would like to have**
- Services and facilities not designed with them (young people) in mind
 - Older people, people with kids happier to just sit there, but they want to be occupied
 - Not convinced that operator considers their requirements for different fares
- Suggestions for asking their thoughts:
 - Interact with them on social media
 - Use pop-up surveys
 - Details on back of bus ticket for online survey
 - Ask them to fill in short questionnaires (paper) on bus
- These could be incentivised through offering a prize draw of free monthly passes or other money off deals for people their age

Desired improvements are clear



Q23) If bus operators were to improve their bus services, what top 3 things should they prioritise?
Base: bus users (807) ; non-bus users (196)

Key requirements for the bus industry

1. Teach young people about **how transport systems work**
 - Where to go and look & what to do. Effective communication channels
 - Make it simple to understand
2. Build **confidence** around what to do
 - Relieve anxieties
 - Don't assume they know what to do
3. **Design** systems **better**
 - Provide easy to find, centralised and streamlined information, visual map, detail on fares – with the ability to personalise
 - Minimal interaction needed, but make it more like other experiences, e.g. cinema, working easily on mobile with ticket purchase and activation
4. Improve the **journey experience** – tackle perceptions
 - Resolve issues with crowding/timekeeping – real time information at stop/on-board
 - At stops/on bus
 - Approachable drivers, information on-board
5. **Review fares** for young people
 - Consistent and logical fares for young people
 - How to find the 'best ticket' can I use my pass? – properly targeted promotions
 - Easy to find the cost, buy ticket and pay



Alexia Course

Director of Rail Operations,
Transport for Wales



Colin Lea

Commercial & Customer Services
Director, TfW Rail Services



TRAFNIDIAETH CYMRU
TRANSPORT FOR WALES

Young People & Rail

Future Plans & Improvements



Mae Trafnidiaeth Cymru yn eiddo i
Lywodraeth Cymru
Transport for Wales is owned by the
Welsh Government



TRAFNIDIAETH CYMRU
TRANSPORT FOR WALES

TRAWSNEWID TRAFNIDIAETH
TRANSFORMING TRANSPORT

£738M TO TRANSFORM VALLEY LINES



£194,000,000
INVESTMENT IN STATIONS
ACROSS WALES.

29% MORE SERVICES & 65% MORE CAPACITY



95%

OF JOURNEYS WILL BE
ON BRAND NEW TRAINS
WITHIN 5 YEARS.

TRAWSNEWID TRAFNIDIAETH

TRANSFORMING TRANSPORT

BARRIERS:

- ☐ **COST**
- ☐ **ACCESS**
- ☐ **SAFETY**

“It is not fair that young teenagers are paying full price adult tickets each day as the minimum wage for them is £4.20 and most tickets are £6+.”

“My [university] journey could be improved if there were facilities for example wifi or an ability to charge my phone.”

“We need an additional member of staff on the train - not just the driver...wouldn't really let my 15 year old daughter travel...it does need more security.”



TRAFNIDIAETH CYMRU
TRANSPORT FOR WALES

TRAWSNEWID TRAFNIDIAETH
TRANSFORMING TRANSPORT

AFFORDABLE
FOR YOUNG PEOPLE



>>> Metro



DELAY REPAY

Reducing fares for young people

Introducing off peak fares

Reducing fares in North Wales

Lowest fare guarantee

Compensation for 15 min delay



**TRAWSNEWID TRAFNIDIAETH
TRANSFORMING TRANSPORT**

**ACCESSIBLE
FOR YOUNG PEOPLE**

Mobile App - one stop shop

**Smart Ticketing and 200 new
ticket machines**

End to end internet access

A true Sunday service

**Improvements to Integrated
Travel**





TRAWSNEWID TRAFNIDIAETH
TRANSFORMING TRANSPORT

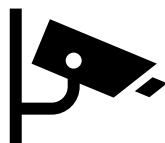
SAFE
FOR YOUNG PEOPLE



Department
for Transport



BRITISH
TRANSPORT
POLICE



Making rail more 'friendly'

Secure Stations Accreditation
Scheme

Funding additional BTP
personnel

Increasing CCTV and improving
lighting

Power and USB sockets on trains



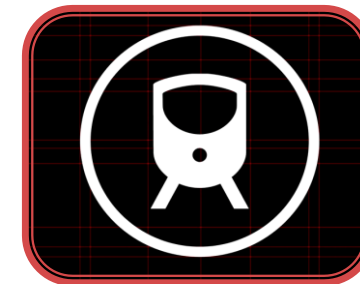
TRAWSNEWID TRAFNIDIAETH
TRANSFORMING TRANSPORT

METRO
CONNECTING YOUNG PEOPLE

Faster, more frequent trains

Build new stations

**Simplified fare structure and
student discount**





TRAFNIDIAETH CYMRU
TRANSPORT FOR WALES

Transforming for young people...

Our Journey has started...



Mae Trafnidiaeth Cymru yn eiddo i
Lywodraeth Cymru
Transport for Wales is owned by the
Welsh Government



Matt Goggins

Liverpool City Region Combined Authority

Young People and Transport

The Liverpool City Region's Approach

January 2019



Merseytravel and the LCR Combined Authority

- The Combined Authority's strategic transport arm
- The Liverpool City Region's transport delivery body
- Builds and maintains transport infrastructure in Merseyside
- Manages the Merseyrail concession
- Operates Mersey Ferries and Mersey Tunnels
- Administers travel tickets and concessionary travel in Merseyside
- Funds non-commercial bus services
- Part of the LCR Bus Alliance and development of Mayoral Transport pledges



Buses in the LCR

- 147m passenger journeys per year; 80% of public transport journeys
- 100,000 people to work every day in LCR; 15% of commuters
- 60,000 people to their place of education every day, key role in increasing post-16 education levels
- Bus users are responsible for 30% of city centre expenditure
- Bus industry one of the biggest providers of employment to LCR residents; over 3,000 jobs
- 30+ apprentice opportunities via the local bus industry
- Buses play a key role in tackling congestion through efficient use of road space – they keep the LCR moving
- Access to the bus network reduces employment deprivation and income deprivation
- Buses help people access the LCR's major events, playing a key role in crowd management and dispersal



Engagement and service design

Engagement with Young People

- STEM resources
- School assemblies
- Primary/secondary transition training
- Focus groups

Working with operators through the Bus Alliance

- Vehicle investment
- Free Wifi and USB charging
- Social seating
- Driver training



Ticketing

- Myticket
- Eligibility criteria
- 50% principle
- 168% growth



Apprentice ticket

- Mayoral pledge
- Reducing barriers to apprentice opportunities
- 50% discount on adult bus prices
- Achieved through partnership working
- Apprentices age 19-24



THANK YOU



Linda McCord
Senior Stakeholder Manager, Transport Focus
Chair, West Midlands Bus Alliance



Andrew Sherrington
Managing Director, First Cymru



Introduction

First Cymru Buses Ltd forms part of First UK Bus which is one of 14 bus companies across the UK

First UK Bus is a wholly owned subsidiary of First Group plc a UK based global public transport company who also operate three UK train companies but also well known bus brands in the USA & Canada such as Greyhound Coaches & First Student.



Setting the scene

Bus companies are in the market for movement

Outside of London, bus companies work in a deregulated market as defined in the 1985 Transport Act, this requires them to operate commercially, profitably & be driven by market forces:

Setting fares

Where the buses go

Timetables

Compete for custom

Currently in Wales, local councils are the transport authority & responsible for the total transport solution:

Consideration of Services/Journeys to fill gaps in the market that are not commercially viable

Park & Ride sites & procurement

Home to School & specialist transport

Public Transport Infrastructure & priority

Parking/cycling



**1.8 million
passenger
journeys**

12.7 million miles operated
133 routes
690 employees
274 buses

How we spend your money?

Where does the money come from?

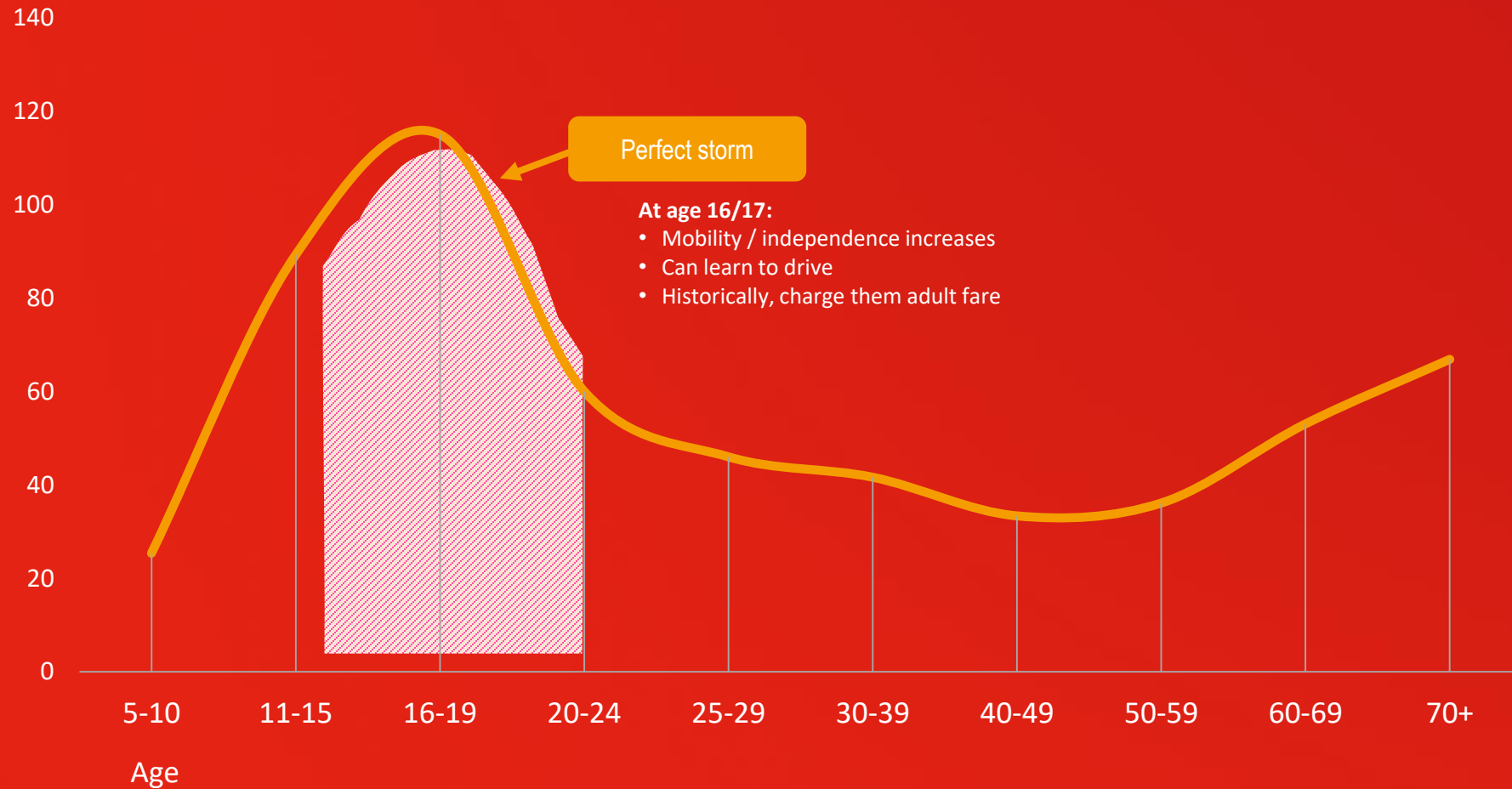
Passenger Fares	49%
Free Concessionary Travel	43%
Coaching, advertising contracts	5%
Council tendered services & schools	3%

Where does every £1 go?

Staff - inc pensions & National Insurance, fuel & tyres	0.61
The cost of maintenance	0.17
Insurance plus investments in buildings & buses	0.08
Admin, shareholder reserves, overheads & Tax	0.13

Bus trips by age

National Travel Survey: Average annual bus trips by age



Source: Based on 2015 NTS, London stripped out

Factors specific to Young People



Factors for All Customers

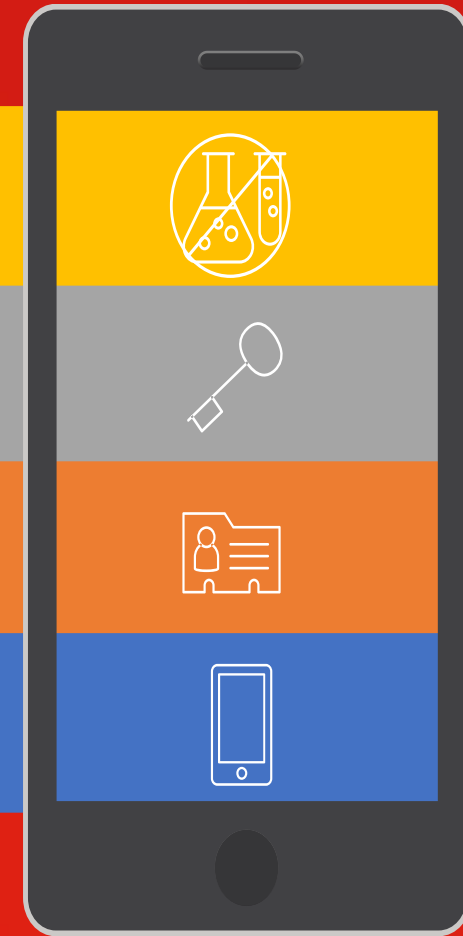
What have we learnt?

Kept it easy to understand

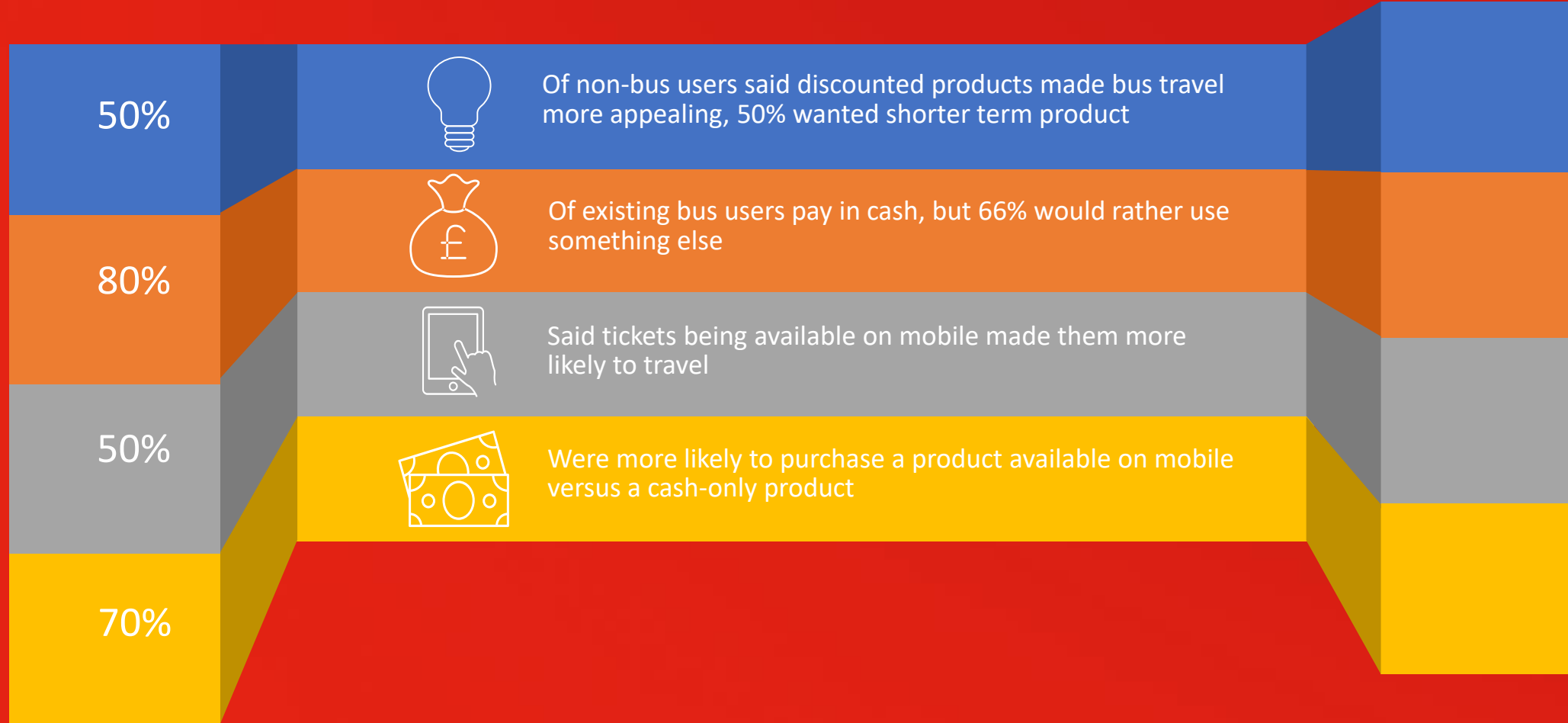
Made it accessible

No ID requirement

Mobile only ticket



What have we learnt?



What have we learnt



Engaging at the
crossroads

01 Creating bus
using habits
now for later in
life



Making it relevant

02 Demonstrate bus
travel can meet
their needs



Bus travel is
“expensive”

03 Making the price
attractive, not
just affordable



Finding the right tone

04 Industry
advertising has to
be engaging

Moving Forward

Remove barriers

Remove barriers on price &
ID and work on
communication

Keep it simple & consistent

Be bold!

Focus on long
term opportunity,
not this year's
budget

Work collaboratively

Operators & LAs working
together



Panel discussion



William Powell

Board Member for Wales, Transport Focus