# Llwybr Newydd – a new Wales transport strategy
## Consultation response

## Introduction

Transport Focus is the independent consumer watchdog promoting the interests of rail passengers throughout Great Britain; bus, coach and tram passengers across England, outside London; and users of the Strategic Road Network in England. We have a Board Member for Wales appointed by the Minister for Economy, Transport and North Wales.

Transport Focus welcomes this consultation. Our response is informed both by our extensive evidence base and insight gathered through the engagement of our work in Wales.

## Consultation questions

**Do you agree with our long-term vision?**
The vision applies across all of Wales and is equally relevant and inclusive to both people and place, needing to recognise the differences between cities, towns and rural areas. We agree that the transport system needs to be accessible, addressing barriers and sustainable. However we would want to see the transport system defining a joined-up network enabling door-to-door journeys. Our work with bus passengers[1] shows that services going to more places is their second highest priority and the top priority for non-users and both sets agree that a good bus network is important to the local area (93 per cent of users and 82 per cent of non-users agree). Rail passengers[2] also want this network to be effective, placing good connections in the top half of their priorities for improvement; but the National Rail Passenger Survey[3] (NRPS) shows the most recent satisfaction with transport connections for Wales and Borders is only 65 per cent.

Achieving the vision will be dependent on the delivery, monitoring and evaluation of the priorities, outcomes, policies and enablers which underpin the vision.

**Do you agree with our 20-year ambitions?**
The four ambitions will need to be at the forefront of transport decision-making, over the next twenty years.

**Good for people and communities**
Addressing barriers is central to this. Our work shows perceived barriers in a number of reports, most recently in submissions to the Williams Rail Review[4]. Points can be brought together under three main headings:

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[1] Bus passengers' priorities for improvement, Transport Focus. 2020
[2] Rail passengers' priorities for improvement, Transport Focus. 2020
[3] National Rail Passenger Survey spring 2020, Transport Focus. 2020
[4] Williams Rail Review – barriers to travel. Transport Focus 2019

- **Cost**: value for money in return for the price of the ticket, availability of discounts and flexible tickets, comparison of the expense when considering an alternative, especially when a group is travelling together
- **Convenience**: including availability of the network, ability to make door-to-door journeys, time taken, potential to work or relax and familiarity of always travelling a particular way or not knowing how to do it another way. Smart ticketing needs to be a convenient option that is easy to use and makes passengers' lives easier
- **Complexity**: lack of familiarity with journey planning, especially factoring in connections, difficulties with timetables, interchange or access, availability of facilities and uncertainties undermining confidence to travel.

Investment decisions need take these factors into account alongside understanding the journeys people want to make, to be able to provide attractive options. An inclusive approach is important. For example, our research exploring challenges for disabled rail users[5] on behalf of the UK Department for Transport, found many practical and emotional barriers being experienced, often linked to their own and others' perceptions especially with non-visible disabilities and potential lack of awareness of what assistance may be available and often having a poorer journey experience. Priorities for improvement mentioned above, shows passengers with disabilities placing higher importance on factors such as toilets, step-free access and personal security. Addressing inequalities can make travel easier for everyone.

**Good for the environment**
The Welsh Government has committed to a net zero emissions target by 2050. The Wales Transport Strategy must ensure that transport contributes to this target, over the lifetime of the strategy. Our priorities for improvement work mentioned above shows that over half of all bus passengers and non-users believe buses can play a part in reducing air pollution to a large or reasonable extent. Rail passengers place 'more environmentally friendly journeys' in the second third of their priorities, however this has slightly more importance in Wales than the rest of Great Britain and is placed higher still by younger passengers.

Transport Focus and London TravelWatch responded jointly to a UK Government consultation[6] on whether consumer behaviour could be changed by providing more information on sustainable forms of travel. This shows that, although there is definite interest in greener transport, other considerations such as reliability, value for money and convenience are all more important in influencing modal choice. However, for many people choice of mode will be limited by the nature of the journeys required. In urban areas with dense public transport provision, a substantial number of journeys will have the choice of a sustainable mode such as a bus or cycling. In a rural area however, choice may be reduced to a single option of a car journey. In very pragmatic terms, providing information on the carbon emissions of a bus is immaterial if your village does not have a bus service.

[5] Disabled rail passengers research, Transport Focus. 2019
[6] Carbon offsetting in transport – a call for evidence, Transport Focus and London TravelWatch. 2019

**Good for the economy and places in Wales**

Supporting connected communities so more people can access work, leisure, education and services resonates with our findings in our priorities for improvement work, where people want better value and reliable network that gives them the network reach to make the journeys they need. It will also address elements preventing more journeys by public transport, as brought out in the Bus Passenger Survey in Wales[7], key points being service frequency, routes available, reliability, length of the journey and cost.

The rail sustainability principles[8] recognise the social impact and contribution of rail. One of the ten main principles is about putting rail in reach of people – positioning rail as an inclusive, affordable and accessible transport system through the provision of information and accessible facilities.

A key part of boosting regional prosperity is through making improvements to transport so that people will consider travelling further for employment and other reasons. Our research shows that addressing issues around fares and tickets is an important part of this, particularly where they make travelling easier to understand and use, and more convenient. These must, though, sit alongside improvements to infrastructure and timetabling.

Digital connectivity is vital for supporting delivery of innovations in smart ticketing and information. Our recent research[9] on the topic found that the level of satisfaction with connectivity on trains is generally low, while the expectation of being connected is high. Most passengers also say that at least some of the journey that they most regularly make is affected by poor connectivity. Those travelling for business tend to be least satisfied and have the highest expectations when it comes to being able to make a connection on trains. This came out strongly from our work with young people on their experience of using buses[10]. Young passengers want to use their time effectively and not feel bored. For them this means listening to music, using social media, browsing the internet and chatting to friends. Wi-Fi is needed to support many of these activities – and it has to be fast and reliable. When asked to rank improvements, this was young people's second highest priority. Equally important was the provision of charging points at seats, particularly when they feel their journey is longer than a short-hop.

Delivering information electronically improves passenger satisfaction. The Bus Passenger Survey[11] shows an increase of 11 per cent when digital next bus displays are available at bus stops. Satisfaction increases by 20 per cent with audio announcements and digital next stop displays onboard.

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[7] Bus Passenger Survey autumn 2017 – Wales, Transport Focus. 2017 and Data Hub
[8] Rail Sustainable Development Principles, RSSB. 2016
[9] Keeping connected: passengers' experience of internet connectivity on GB railways, Transport Focus. 2020
[10] Using the bus: what young people think, Transport Focus. 2018
[11] Bus Passenger Survey autumn 2019, Transport Focus. 2019 and Data Hub

Innovations in service design and provision can help to provide a joined-up travel network and address decline. Demand and integrated responsive services are increasing. Initial experience of some of these new app-based initiatives shows encouraging signs about the potential to encourage young people and car drivers to travel more by bus. It will be important that these new services and changes to traditional travel patterns are taken into account.

Passengers across modes see real benefits in technological advances, such as smart ticketing. We know from our research programme on smarter travel[12] that there are seven key attributes that drive attitudes and views:

- Value for money – a key driver for ticket choice. Expectations of cost savings through cheaper fares or new cost-effective products
- Convenient, easy to use and makes life easier
- Simple – important especially for those unfamiliar with smart technology, where a simple system is likely to support a move to smart ticketing
- Secure, keeping personal data safe, addressing people's concerns and easy to cancel and reissue smart cards if stolen
- Flexible, with the ability to choose new products and tickets that offer more flexible travel options
- Tailored management, enabling participants to tailor smart ticket products to their needs and choice of how to manage their smart ticketing account
- Leading edge and a more technology-focused way of ticketing that is forward-thinking, rather than replicating existing systems.

**Good for culture and the Welsh language**

Good access to Welsh culture can provide strong attraction for leisure journeys. Our work on making rail travel more attractive to infrequent and non-users[13] included asking reasons for making more journeys by train. This found one of the top reasons is having more leisure time. However their choice of mode is likely to have a high degree of discretion, so attractive transport options need to be provided, or they may choose to drive instead.

Encouraging increased use of Welsh language will support transport being more inclusive, improve equality of access to information and services and ease of use for those who wish to engage through Welsh; as well as contributing to the aims of increasing Welsh speakers in line with *Cymraeg 2050*.

Provision of sufficient capacity for major events presents a challenge. It is essential that organisers, service providers and other agencies work together to develop a strategy that is tailored to each event. Provision of sufficient capacity, sensible demand management strategies, joint working with other organisations and good quality, timely information are all key to managing and delivering successful transport plans – including engaging with

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[12] A smarter way to travel, Transport Focus. 2016
[13] Tomorrow's rail passengers: making rail travel more attractive, Transport Focus. 2018

regular passengers who may not be aware of events and prefer to change their journey. Significant numbers of passengers may be travelling on trains that are already crowded and through stations not designed to cope with these increased numbers. In addition, passengers may well be making journeys for the first time and therefore not be familiar with stations, routes and timetables, so a strong and well-informed staff presence is essential at both stations and on trains to provide passengers with the information and reassurance they desire.

**Do you agree with our 5-year priorities?**
**Do you think that we have the right number of priorities or should these be further refined?**

The five-year priorities would seem to underpin the themes of the national strategy. However the closer this is aligned with passengers' priorities, the better the potential service for passengers and the more attractive for encouraging modal shift.

Better connectivity is crucial to providing an attractive public transport system. One of the barriers to encouraging more journeys is the ability to reach destinations by bus. This is reflected in our research into bus passengers' priorities for improvement; where buses going to a wider range of destinations is the second highest priority. It is therefore vital to incentivise development of service networks, across a range of provision with properly planned connections and good standards of information, to give passengers the ability and confidence to make joined-up journeys, including across modes. Bus passengers' third priority is better punctuality and fourth is better value for money, which are the top two priorities for rail passengers in Wales. This common interest emphasises the importance and benefits of aligning objectives between transport authorities and service operators, to deliver a well-supported door-to-door journey experience across modes, which will be a positive factor towards improving connectivity and encouraging travel by public transport.

For rail users, our work[14] shows their top priorities are reliability and punctuality, value for money and getting a seat. In Wales, clean toilets, comfort onboard and environmentally friendly journeys are placed higher. Younger passengers also place higher importance on more environmentally friendly journeys, along with better information during delays, fewer disruptions and good connections. Passengers with a disability put clean toilets, improved personal security and step-free access higher on their list. Tables of priorities for improvement are collated in Appendix 1.

**We have identified high level measures to aid us to capture our overall progress. Are these the right measures?**
**Do you think we should include specific targets for more people to travel by sustainable transport?**

Targets, measurements, monitoring and their transparent reporting are fundamental to delivering improvements to service quality. Transport Focus strongly supports the principle

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[14] See note 2

of monitoring and improving service quality through a combination of research results and periodic reviews of targets and Key Performance Indicators (KPIs).

Specifications and targets must stretch service providers to take passenger satisfaction to higher levels across Wales and the borders. This should apply both for the network as a whole and at a more localised level, as well as potentially aiming at travelling more sustainably. There is a need to achieve greater consistency of performance across the component parts of the network and also to drive satisfaction on all aspects of service delivery upwards, to bring the whole of transport provision up to the achievements of the best comparators.

We welcome the prospect of a National Travel Survey. Strengthened evidence will ensure robust and flexible decision making. However it is important for this to have independent assessment with comparison and benchmarking across nations, regions and modes.

Our research suggests that passengers want their transport operators to be accountable, with published data to 'keep the industry honest'. The National Rail Passenger Survey plays an important role in formal and independent measurement of rail service delivery and provides the means for writing this accountability into new franchise specifications as well as providing a means of benchmarking services across different regions. We believe that in a similar way, developing a consistent and benchmarked approach across transport provision will focus industry attention on key areas for improvement, alongside intelligence on drivers of satisfaction.

The Bus Passenger Survey is a further example. Wales was included in the Bus Passenger Survey in 2017 and is included in our current qualitative and quantitative research, asking people across Britain about bus services. These provide a robust basis for monitoring service delivery and securing continued improvements; with the published accountability that passengers seek.

There is also a need to understand the views of those who don't use public transport, have recently stopped, or don't have a service they can use. This would provide understanding of their decisions, perceived barriers and potential for policy actions to attract and encourage more people to use both public transport and active travel to make their journey.

Transport Focus could assist with developing the National Travel Survey and designing measures on achieving outcomes at a national, regional and local level and publish a consumer report across modes; deliver crucial understanding of non-users' experience, barriers to use and what would encourage greater use of public transport modes The monitoring and evaluation framework could be aligned with the vision for transport and each individual target to inform the Strategy's Delivery Plan.

Transport Focus has built an enviable reputation for independent, multimodal, top quality insight and policy work which is useful to transport decision makers. Our evidence, being gathered in new and faster ways, can help the Government's desire to rebuild trust in transport services.

- We continue to develop our insight capabilities to meet new challenges and as needs change, evolve and emerge, providing fresh understanding and extracting more value for transport users and others. For example, we have been increasing engagement with the Transport User Panel online, particularly during Covid-19.
- Artificial Intelligence (AI) is now used to analyse the wealth of verbatim comments collected. All Transport Focus's insight data is now accessible online and available to all via our Data Hub.
- Our Omnibus research is successfully tracking views and attitudes during Covid-19
- An interim form of the National Rail Passenger Survey and Bus Passenger Survey are now underway in the field
- We are reviewing how we undertake NRPS and BPS effectively in the post-Covid future
- Our tracker surveys could be used across all modes to benchmark satisfaction and ensure consumers are at the heart; building trust with the strategy.

**We have identified a set of actions to deliver the draft strategy. Are they the right actions?**

Communities and the consumer voice should be strengthened as the decisions made will have an effect on their travel choices and behaviour. Our research shows that consumers want change and they want their voice to be heard. We believe there is considerable scope to transform engagement in the following areas.

- Comprehensive social media activity. When we launched our "Make Delay Pay" campaign[15] on 22 July, we used social media promotion for the first time. Consumers want to engage in different, new ways that suit them, and they want this to be immediate and easily accessible. The effect was dramatic. A relatively small investment produced around 1.6 million impressions in the first week - more than we have ever had.
- Empowerment of consumers. A strong social media capacity will also help inform inform/educate passengers on sustainable transport choices. Data visualisation techniques and videos can also be very effective at getting a simple message across to a great many people. Running a form of citizens jury/deliberative research to gather in-depth views/feedback on specific transport issues can be advantageous.
- For example, the Government's ambitions around climate change are necessarily challenging. We all need nudging towards more sustainable forms of transport. Non-users of rail and bus need to be understood better in order to drive a modal shift: what will really attract new passengers?

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[15] Make Delay Pay, Transport Focus. 2019

- This poses a particular challenge for rail: how to attract more passengers at off peak times in particular? Bus use is declining in some areas: how can this be reversed? Transport Focus's *'Give Bus a Go'* campaign[16] is helping the understanding of these issues. The move to electric vehicles throws up some key consumer issues around charging point and payments. There is also a raft of opportunities and risks arising from autonomous and (shared) 'on demand transport' using the road network.

However, nobody wants to be forced into changing their behaviour. We all make our transport choices through trading off cost, convenience, choice, control and, increasingly, climate. Making more sustainable forms of transport a more attractive choice will be key. Involving consumers in those specific decisions where Transport Focus is uniquely positioned to provide independent advice based on the strengthened consumer voice to assist delivery of the strategy's outcomes.

The strategy draws attention to improved passenger representation being vital. We welcome the commitment to forming a transport advisory group and commissioning an independent review of progress within five years. Such accountability is important in building trust with users.

However we have identified a gap in the strategy for independent representation of transport users across Wales. Transport Focus has a valued position of influence and a name for credibility. But transport users in Wales do not have the same standard of advocacy as their counterparts across the border. Having a Welsh transport user consumer organisation, which bases its work on evidence and aims to be both useful to those making major decisions about transport and makes a difference on the ground for all users, will create a strong new voice in Wales.

To give focus and energy to representing Welsh transport users, we have already taken the step of establishing Transport Focus Wales Ltd, which is able to apply our experience to work in partnership with service providers, Transport for Wales (TfW) and local authorities to identify the barriers to public transport; improve the user experience and share good practice with operators and authorities across Wales.

- **Already recognised** with TfW Rail and Network Rail providing investment in working more closely as a 'critical friend', supporting understanding and improved service delivery, which is also crucial in approaching the Valleys transformation, implementing Metro services and understanding lessons learnt from other networks
- **Benefiting from research** with our bus research programme currently underway in Wales and across Britain. Also discussions with TfW to research the *Fflecsi* buses, how these help to meet people's needs and compare with similar service provision
- **Building on existing experience:** working in various partnership models with operators and government. Key examples are the well-established West Midlands

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[16] Give Bus a Go, Transport Focus. 2019

Bus Alliance, chaired by Transport Focus and senior roles with alliances in Liverpool City Region, West Yorkshire and early involvement in emerging schemes in South Yorkshire and Cambridgeshire/Peterborough and bus partnerships in Scotland. We are also very pleased to have an active role in the TfW Advisory Panel, which we are currently chairing

- **Ready and equipped to be a delivery partner** for Welsh Government and Transport for Wales, building on our reputation for independent, multi-modal representation, including road users, with top-quality insight, campaigning and policy work which drives positive change for transport users and is useful to transport decision makers.

**We have set out mini plans for each transport mode and sector. Have we identified the key issues for each of these?**

The mini plans are rightly ambitious, but it is imperative that such ambitious plans are adequately supported by sustained financial investment. There also needs to be reassurance that the plans have a shelf-life beyond the current parliament.

Pivotal to the success of the delivery of the plans will be keen oversight and scrutiny across modes. Whilst it is important to provide a focus for each mode, it is important that they do not become fragmented. The plans need to be reviewed holistically at regular intervals and leads need to work together to ensure that where there are interdependencies, that activity is kept on track.

Embedding the passenger voice early into decision-making processes is vital – this not only develops trust and transparency, but can also help to avoid costly mistakes. Passengers are best placed to provide insight into what makes public transport work for them and they should be meaningfully involved in areas such as station redesign, wayfinding initiatives, and rolling stock design. The redevelopment of Cardiff Central station is an excellent opportunity to gain a passenger perspective. The coronavirus pandemic and the emerging climate change crisis will impact on how passengers travel in the future. Consideration needs to be given to how the design of trains may need to evolve to suit different journey types. Increased leisure journeys, for example, may mean more space is needed for luggage. Those wishing to combine modes (e.g. rail and cycling, rail and micro mobility transport) to complete their journey may be more concerned about the availability of cycle spaces on board services, or space to store electric scooters. Space may become more pressing as a result of the pandemic. Longer journeys traditionally undertaken by car could be replaced by rail or coach journeys meaning catering facilities may become more of a priority. Equally the drive for a healthier Wales means those provisions need also to consider healthy eating options and changes in dietary requirements, not just on board services, but at transport interchanges.

Encouraging people to shift to more sustainable modes of transport will require concerted effort as this will need a complete mindset change. Many people may lack confidence in using public transport as they may never have used it before and may not know what to

expect, or be lapsed users and unfamiliar with new processes. Our *Give Bus a Go* campaign piloted in the West Midlands area provided valuable insight into barriers for people using the bus. Infrequency, journey length and lack of buses going directly to their desired destination were key barriers[17]. Those trying the bus for the first time as part of the pilot were largely pleasantly surprised with their experience. On-demand services such as *Fflecsi* are examples of transport meeting the needs of the consumer, but it is important to evaluate this and other modes of transport effectively from a passenger perspective to drive continuous improvement. Transport Focus is uniquely placed to deliver high quality research across modes.

A passenger journey may involve various elements – walking, cycling and public transport. These need to connect well to create seamless door-to-door journeys and also consider the wider environment. Are pavements linking modes free of obstacles? Is lighting adequate? What safety measures are there in place to make sure people feel safe travelling irrespective of the time of day or night, not just on board public transport, but on key routes to the transport hub? Again, those with disabilities or mobility issues may find this particularly challenging. An example is the passenger assist service – whilst there is support for passengers on board services, and at stations, this is not the end of their journey. A more joined-up approach with other modes will help passengers complete their journeys more easily and improve satisfaction.

Active travel initiatives must also consider the needs of less able-bodied individuals who may find current arrangements prohibitive. Whilst 'bikeshare' schemes such as those operating in Cardiff and Swansea are a welcome addition to the network, such schemes need to be more inclusive. Understanding the needs of all transport users is vital and engaging with disability groups and the Transport for Wales accessibility panel will help to develop more accessible travel. There is an ageing population and the specific needs of older people also need building into long term planning.

It is encouraging to see that training around disability features within the plans.  It is important that there is a consistent approach so passengers can expect the same level of support irrespective of operator or geographical location. We would advocate a railway-style charter or 'passenger promise' to be put in place, underpinning and explaining the requirements and provisions for all passengers on accessibility and also extending to measures such as compensation for delays and disruption to journeys.

**Young people**
Our research[18] shows investment is also needed in improvements for young people. In some respects, young people want the same thing from their bus journey as their fellow passengers, ranking value for money, punctuality and reliability highly as priorities for improvement. However, there are key differences.

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[17] Giving Bus a Go campaign update, Transport Focus. 2019
[18] See note 10

They don't feel that services are designed with them in mind or that enough is being done to make them feel valued. Not knowing how the system works or what to do is a barrier and a source of anxiety about 'getting it right'. Improving the journey experience is important; young people notice poor quality provision. There is a need to design systems better, learning from other industries in the way they appeal to young people. Fares for young people are confusing and inconsistent.

**Accessibility**

Transport Focus holds an accessibility forum twice a year that examines the concerns of both an ageing population and people with disabilities to provide a framework for delivering improvement to their travelling experience.

Transport Focus has conducted ground-breaking research in England, into the specific needs of disabled motorists. We would welcome the opportunity to repeat this survey in Wales, where the greater travel distances between built-up areas may present greater issues to disabled motorists.

**Climate Change**

The Government's ambitions around climate change are necessarily challenging. We all need nudging towards more sustainable forms of transport. Non-users of rail and bus need to be understood better in order to drive a modal shift: what will really attract new passengers?

This poses a particular challenge for rail: how to attract more passengers at off peak times in particular? Bus use is declining in some areas: how can this be reversed? Transport Focus's campaign[19] will help the understanding of these issues. The move to electric vehicles throws up some key consumer issues around charging point and payments. There is also a raft of opportunities and risks arising from autonomous and (shared) 'on demand transport' using the road network.

However, nobody wants to be forced into changing their behaviour. We all make our transport choices through trading off cost, convenience, choice, control and, increasingly, climate. Making more sustainable forms of transport a more attractive choice will be key. Transport Focus could assist Government as it works out new strategies to change travel behaviour. Having an independent, multi-modal view from the consumer perspective will be vital to Government and the public.

While road users should be encouraged to switch to public transport, road will remain for many years the dominant form of transport. It is therefore vital to understand, and act on, the satisfaction of all groups of road users (including women, the disabled, HGV drivers, and non-motorised users, etc). Transport Focus could extend its existing road survey to Wales, to ensure that the voices of these and other groups are heard.

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[19] See note 16

**Reliability and Demand Management**

Analysis of NRPS shows that punctuality is the biggest single driver of satisfaction while managing delays is the biggest single driver of dissatisfaction.

The effect of performance on passenger satisfaction can be clearly demonstrated by mapping passenger satisfaction with punctuality from each NRPS wave against the trends for Public Performance Measure (PPM), right time and passenger time lost. Publishing data in a way that passengers can relate it to their service builds trust in service provision.

**Information and Integration**

Our research into transport integration in Scotland[20] indicates the need to improve links between transport modes in Scotland and across the border, to help make public transport a more attractive option for those travelling for work, business and for leisure. multi-modal journey allows passengers to move from to with more than one journey leg and perhaps more than one mode of transport. Good offers seamless, convenient journeys timed connections. greater shift to more sustainable, integrated journeys will help to reduce emissions and congestion.

There are many simple and/or routine integrated journeys which passengers made with minimal effort and hassle. This evidence shows that steps taken to create a more consistently seamless door-to-door travel experience - and to communicate about them to passengers - will help overcome negative perceptions.

Our research found that barriers to rail travel needed to be overcome before integrated journeys can be more widely considered across the general public. Currently, there is an issue of gaps between the *perception* of rail travel and the reality of the experience. However, rail is favoured in the research – with those tasked with giving rail a go more openminded to its benefits – which has revealed opportunities for promoting rail use at times when personal car use is less convenient. In doing so, there will be a need to challenge the car's strong status as the default benchmark of 'good travel' among infrequent/non-public transport users. This is more challenging in rural areas where there is an even stronger tendency towards the car given the lower frequency of transport provision at both peak and off-peak times.

There were four key areas for attention which will enhance the experience of integrated travel for passengers and potential passengers.

- Information - to give passengers the tools to proactively plan their journeys and make them smoother and less stressful overall.
- Travel environment - to improve the comfort and security of rail and integrated travel.

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[20] Transport Integration in Scotland, Transport Focus. 2014

- Infrastructure and service provision to make rail and integrated travel as accessible and as tailored as possible around passengers' needs – for example, car parking for those in more remote areas with limited access to the station.
- Ticketing, costs and fares - to simplify the purchasing process for passengers by putting in place new technology to enhance convenience and to benefit passengers with potential cost-savings and greater flexibility of available transport options.

For those who rarely or never used rail or other public transport, needs centred more on overcoming environmental barriers on rail and public transport generally. Security and the cleanliness and comfort on trains were key.

**Post-Covid recovery**

Recovery from the coronavirus pandemic will invariably continue to impact on the transport sector in the coming years, therefore there needs to be some scope for flexibility within the plans.

Building trust will be key to bringing lapsed passengers back on to public transport once restrictions ease. Our recent omnibus survey[21] highlighted that almost nine in 10 who had travelled by rail in the previous two weeks, found the experience satisfactory and four in five bus passengers – and this has been relatively consistent over recent months. There is however a perception gap about how safe public transport is amongst those who were regular travellers but have not travelled for some time. It is this group that will be challenging to engage. Our evidence suggests that passengers are concerned about the enforcement of face coverings (unless exemptions apply), social distancing, and the cleanliness regimes in place to keep them safe. Our perceptions of safety report[22] highlights that the ability to keep a safe distance holds the highest share of importance in terms of driving passenger feelings of safety across all three modes of transport (22 per cent on buses both in and outside London, 20 per cent on trains).

Passengers have told us that they want tangible evidence that enhanced cleaning regimes are in place. It is likely that cleanliness will continue to be a priority even post-Covid. We are also finding the view from our transport user community[23] that safety is emerging as an overriding priority:

> *"The car industry is a major polluter, and I am glad the industry is undergoing a change within the next 10 years, although this will mean a cost to a lot of individuals personally. In terms of encouraging us to use more public transport, it would have to be safe."* **Female, 32, Wales, rail passenger**

People's working patterns were already beginning to change before the start of the pandemic with increased homeworking starting to become more commonplace. The pandemic has, however, catalysed the process.

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[21] Travel During Covid-19 Survey - week 34, Transport Focus. 2021
[22] Perceptions of safety on public transport - key drivers analysis, Transport Focus. 2021
[23] The environment and travel - Transport User Community, Transport Focus. 2021

We have been speaking to thousands of passengers each week during the pandemic via our omnibus survey and transport user communities. Evidence from our recent survey highlights:

- Almost nine in 10 (86 per cent) of those who used to be rail commuters before Covid said that they do not physically need to attend their workplace all the time in order to do their job
- The vast majority (88 per cent) of these (ie those who aren't tied to the office) expect to work from home more in future. This compares with 44 per cent who worked from home some or all of the time prior to March 2020
- There is a significant drop in those who say they will commute five days a week in future – from 43 per cent pre-Covid to 12 per cent post-Covid
- Those saying they will commute four days a week has also dropped, from 24 per cent to 9 per cent
- There is an increase in those saying they will commute from one to three days a week. Those saying they will commute one day a week has increased from 9 per cent pre-Covid to 24 per cent in future; those commuting two days has increased from 10 per cent to 31 per cent, and for three days from 14 per cent to 19 per cent.

In tandem with this, Welsh Government have the long-term ambition for 30 per cent of people working from or near to their home. This means that for many passengers, the season ticket concept is likely to be a less attractive proposition than it has been historically. Flexible ticketing opportunities will be key to ensuring public transport remains value for money for those who in the future are likely to travel less frequently to their usual place of work. It must also be noted that for many, particularly key workers such as the health and retail sector, there is no option to work from home. Public transport must also meet their needs and represent value for money.

Evidence from our transport user community[24] suggests that people are very receptive to the idea of flexible season tickets. We looked at people who were commuters before Covid and who have the ability to work from home in future. Of these 79 per cent say that a flexi-season ticket option would be attractive to them in the future.

The TfW carnet-style rail ticket is a good example offering value for money, but there are opportunities to develop the concept further. In order to generate a sustained revenue stream, a clear understanding of the types of journeys passengers will want to make in a post-Covid world will be key. Multi modal ticketing and simpler, equitable fares systems will make the travel experience much more streamlined for the passenger. There is an opportunity to review the fares system to iron out anomalies such as the need for split ticketing, in order to gain best value. We have seen throughout the pandemic numerous examples of how businesses have adapted and have developed innovative solutions to suit their changing customer needs and the transport sector needs to be equally

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[24] Travel and ticketing post-Covid - Transport User Community, Transport Focus. 2020

responsive to changes in its client base and to capitalise on opportunities to attract new customers to public transport. Understanding barriers to using public transport is essential.

Whilst digital approaches to ticketing and support services can provide financial efficiencies and increased customer satisfaction for many, consideration must be given to those who may find it more difficult to engage with technology such as older people and those who are digitally excluded. For some passengers, the reluctance to use technology may purely be down to confidence and fear of making online purchases due to well publicised threat of scams targeted at older and more vulnerable groups. It is important that they are not marginalised and deterred from using public transport if it is to be truly inclusive. Initiatives that supporting these groups to gain the confidence to use online services will accelerate adoption.

It is important to consider how road space can be apportioned appropriately between modes to ensure harmony and create an efficient multi-modal transport system. Decisions about this should not be taken in isolation. The recent judicial review about streetspace plans in London is an example of how fundamental it is to engage all stakeholders early in the design process, including those who use the roads. Temporary schemes such as pop-up cycle lanes can create particular challenges for those with disabilities and this group needs to be engaged in discussions to ensure they are not negatively impacted.

Looking back at what we have learned from our insight in 2020 provides a number of key lessons about what makes people feel safe travelling now – while we live with Covid-19 – and about attitudes to travel in the future. Our insight confirms we should not expect a quick return to the 'old normal' and points to five key areas where transport operators should focus their efforts:

Ensuring passengers can make essential journeys with confidence now:
- Provide capacity and improve information to support social distancing onboard
- Maintain improved cleanliness and communicate this effectively
- Drive up compliance with the rules, especially face coverings (if not exempt).

Attracting passengers back when the time is right:
- More flexible fares for less frequent commuters
- Offers and promotions to encourage lapsed users to return.

**We have shown how transport will use the 5 ways of working set out in the Well-being of Future Generations (Wales) Act 2015. Do you agree with this approach?** Implementing the strategy through the five ways of working will maintain a consistent approach across policies and a more sustainable approach to transport that has a positive impact on our health and wellbeing into the future.

## Conclusion

We welcome the ambitious proposals in the Wales Transport Strategy. Our key points for the benefit of transport users:

Priorities at the heart to attract modal shift
- Joined-up network with better connectivity
- Better punctuality and reliability
- Better value for money, flexible and innovative ticketing

Understanding barriers and issues from robust evidence gathered across modes
- Addressing barriers to travel: cost, convenience, complexity
- Issues for young people and those with disabilities
- Benchmarking measures with other nations and regions – sharing best practice

Independent representation of transport users
- Holding to account for service delivery and challenging providers
- Across all modes and across Wales.

Transport Focus stands ready to work with Welsh Government and Transport for Wales to assist in the delivery of the transport strategy, for the benefit of people across Wales.

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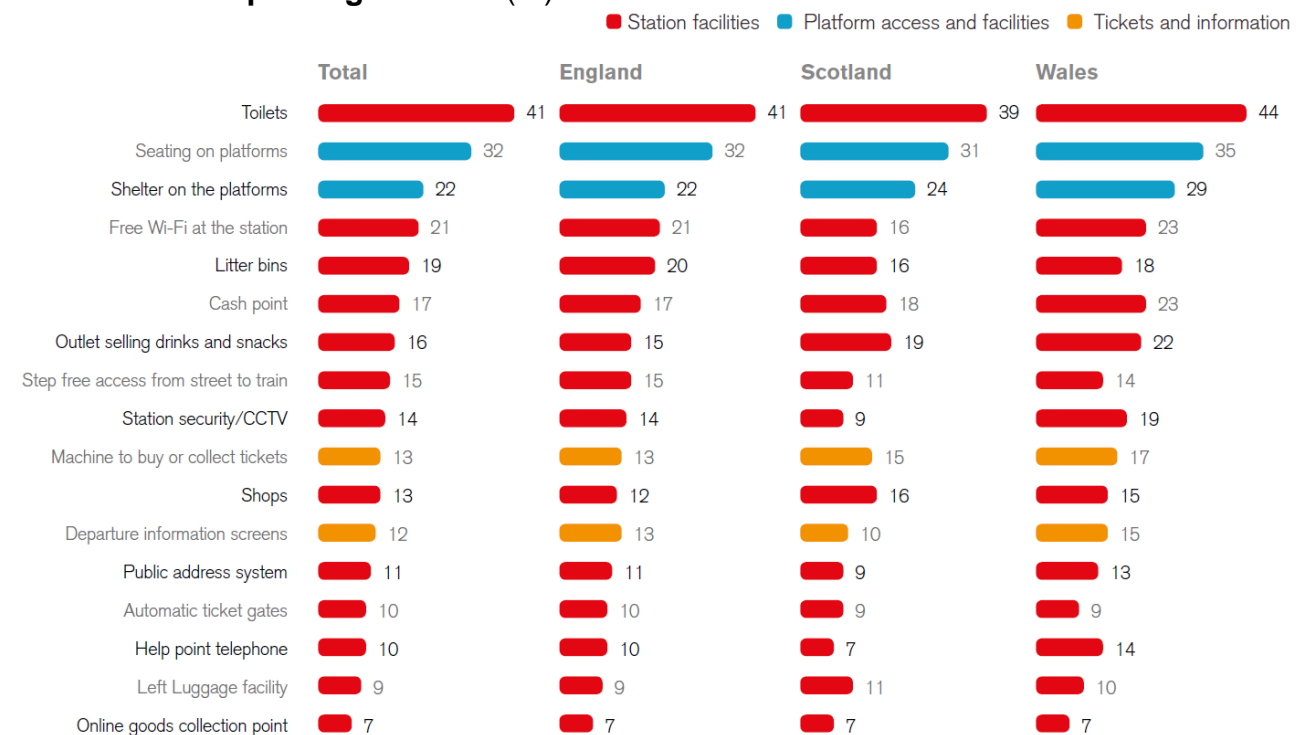**Twitter:**        @TransportFocus

**January 2021**

## Appendix 1
## Rail passengers' priorities

| | Great Britain | | England | | Scotland | | Wales | |
|---|---|---|---|---|---|---|---|---|
| | Rank | Index | Rank | Index | Rank | Index | Rank | Index |
| Reliability and punctuality | 1 | 245 | 1 | 245 | 1 | 245 | 1 | 246 |
| Price of train tickets offers better value for money | 2 | 237 | 2 | 237 | 2 | 240 | 2 | 245 |
| Passengers able to get a seat on the train | 3 | 201 | 3 | 199 | 3 | 212 | 3 | 216 |
| Trains sufficiently frequent at the times I wish to travel | 4 | 164 | 4 | 165 | 4 | 162 | 4 | 164 |
| Train company keeps passengers informed about delays | 5 | 150 | 5 | 150 | 7 | 143 | 5 | 149 |
| Inside of train is maintained and cleaned to a high standard | 6 | 139 | 7 | 137 | 5 | 154 | 6 | 145 |
| Accurate and timely information available at stations | 7 | 138 | 6 | 139 | 8 | 133 | 7 | 139 |
| Accurate and timely information provided on trains | 8 | 130 | 8 | 131 | 9 | 124 | 9 | 131 |
| Well-maintained, clean toilet facilities on every train | 9 | 129 | 10 | 126 | 6 | 148 | 8 | 138 |
| Less disruption due to engineering works | 10 | 125 | 9 | 128 | 10 | 106 | 10 | 109 |
| Connections with other train services are always good | 11 | 103 | 12 | 103 | 11 | 103 | 11 | 104 |
| Journey time is reduced | 12 | 102 | 11 | 104 | 12 | 95 | 14 | 90 |
| Good connections with other public transport at stations | 13 | 91 | 13 | 91 | 14 | 92 | 13 | 90 |
| Seating area on train is more comfortable | 14 | 86 | 15 | 85 | 13 | 94 | 12 | 94 |
| Easier to buy the right ticket | 15 | 86 | 14 | 86 | 15 | 92 | 15 | 85 |
| Improved personal security on the train | 16 | 82 | 16 | 83 | 16 | 77 | 16 | 80 |
| More room to stand comfortably on busy trains | 17 | 75 | 17 | 76 | 19 | 64 | 17 | 76 |
| Improved personal security at the station | 18 | 70 | 18 | 71 | 20 | 64 | 20 | 66 |
| Stations maintained and cleaned to a high standard | 19 | 68 | 19 | 68 | 17 | 75 | 19 | 69 |
| More environmentally friendly journeys | 20 | 66 | 20 | 66 | 18 | 68 | 18 | 74 |
| Easier to claim compensation when delayed | 21 | 59 | 21 | 61 | 26 | 51 | 27 | 49 |
| Free Wi-Fi available on the train | 22 | 58 | 22 | 58 | 23 | 58 | 23 | 57 |
| Sufficient space on train for passengers' luggage | 23 | 57 | 23 | 57 | 22 | 60 | 21 | 62 |
| Train staff have a positive, helpful attitude | 24 | 56 | 24 | 55 | 21 | 63 | 22 | 59 |
| Access from station entrance to boarding train is step-free | 25 | 54 | 25 | 54 | 25 | 51 | 26 | 49 |
| Station staff have a positive, helpful attitude | 26 | 52 | 26 | 51 | 24 | 57 | 24 | 54 |
| More staff available at stations to help passengers | 27 | 48 | 27 | 48 | 28 | 47 | 28 | 47 |
| More staff available on trains to help passengers | 28 | 47 | 28 | 47 | 27 | 47 | 25 | 49 |
| Better mobile phone signal on trains | 29 | 42 | 29 | 43 | 29 | 39 | 29 | 34 |
| Free Wi-Fi available at the station | 30 | 36 | 30 | 37 | 30 | 33 | 30 | 31 |

## Priorities for improving stations (%)

■ Station facilities   ■ Platform access and facilities   ■ Tickets and information

| | Total | England | Scotland | Wales |
|---|---|---|---|---|
| Toilets | 41 | 41 | 39 | 44 |
| Seating on platforms | 32 | 32 | 31 | 35 |
| Shelter on the platforms | 22 | 22 | 24 | 29 |
| Free Wi-Fi at the station | 21 | 21 | 16 | 23 |
| Litter bins | 19 | 20 | 16 | 18 |
| Cash point | 17 | 17 | 18 | 23 |
| Outlet selling drinks and snacks | 16 | 15 | 19 | 22 |
| Step free access from street to train | 15 | 15 | 11 | 14 |
| Station security/CCTV | 14 | 14 | 9 | 19 |
| Machine to buy or collect tickets | 13 | 13 | 15 | 17 |
| Shops | 13 | 12 | 16 | 15 |
| Departure information screens | 12 | 13 | 10 | 15 |
| Public address system | 11 | 11 | 9 | 13 |
| Automatic ticket gates | 10 | 10 | 9 | 9 |
| Help point telephone | 10 | 10 | 7 | 14 |
| Left Luggage facility | 9 | 9 | 11 | 10 |
| Online goods collection point | 7 | 7 | 7 | 7 |

# Rail passengers' priorities – by age

| | All passengers | | 16-25 | | 26-44 | | 45-64 | | 65+ | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Rank | Index | Rank | Index | Rank | Index | Rank | Index | Rank | Index |
| Reliability and punctuality | 1 | 245 | 2 | 229 | 2 | 238 | 1 | 258 | 1 | 257 |
| Price of train tickets offers better value for money | 2 | 237 | 1 | 235 | 1 | 238 | 2 | 247 | 3 | 221 |
| Passengers able to get a seat on the train | 3 | 201 | 3 | 162 | 3 | 188 | 3 | 225 | 2 | 233 |
| Trains sufficiently frequent at the times I wish to travel | 4 | 164 | 5 | 150 | 4 | 168 | 4 | 175 | 7 | 154 |
| Train company keeps passengers informed about delays | 5 | 150 | 4 | 152 | 5 | 143 | 5 | 152 | 4 | 161 |
| Inside of train is maintained and cleaned to a high standard | 6 | 139 | 8 | 126 | 6 | 133 | 6 | 143 | 5 | 158 |
| Accurate and timely information available at stations | 7 | 138 | 6 | 139 | 7 | 132 | 7 | 140 | 8 | 150 |
| Accurate and timely information provided on trains | 8 | 130 | 7 | 135 | 9 | 127 | 9 | 130 | 9 | 134 |
| Well-maintained, clean toilet facilities on every train | 9 | 129 | 11 | 114 | 10 | 122 | 8 | 134 | 6 | 154 |
| Less disruption due to engineering works | 10 | 125 | 9 | 125 | 8 | 130 | 10 | 126 | 10 | 113 |
| Connections with other train services are always good | 11 | 103 | 12 | 102 | 12 | 102 | 11 | 104 | 11 | 103 |
| Journey time is reduced | 12 | 102 | 10 | 116 | 11 | 120 | 13 | 91 | 21 | 64 |
| Good connections with other public transport at stations | 13 | 91 | 14 | 93 | 13 | 93 | 15 | 90 | 14 | 88 |
| Seating area on train is more comfortable | 14 | 86 | 19 | 73 | 14 | 85 | 14 | 91 | 12 | 97 |
| Easier to buy the right ticket | 15 | 86 | 20 | 73 | 16 | 82 | 12 | 95 | 13 | 96 |
| Improved personal security on the train | 16 | 82 | 18 | 76 | 17 | 81 | 16 | 87 | 15 | 86 |
| More room to stand comfortably on busy trains | 17 | 75 | 15 | 90 | 15 | 83 | 18 | 67 | 25 | 52 |
| Improved personal security at the station | 18 | 70 | 22 | 67 | 19 | 70 | 17 | 72 | 18 | 70 |
| Stations maintained and cleaned to a high standard | 19 | 68 | 21 | 69 | 20 | 69 | 19 | 65 | 16 | 73 |
| More environmentally friendly journeys | 20 | 66 | 13 | 100 | 18 | 71 | 23 | 50 | 26 | 47 |
| Easier to claim compensation when delayed | 21 | 59 | 16 | 84 | 21 | 67 | 26 | 48 | 28 | 33 |
| Free Wi-Fi available on the train | 22 | 58 | 17 | 78 | 22 | 67 | 27 | 46 | 27 | 37 |
| Sufficient space on train for passengers' luggage | 23 | 57 | 23 | 64 | 24 | 53 | 22 | 53 | 19 | 68 |
| Train staff have a positive, helpful attitude | 24 | 56 | 27 | 49 | 26 | 51 | 20 | 59 | 17 | 71 |
| Access from station entrance to boarding train is step-free | 25 | 54 | 25 | 59 | 23 | 54 | 28 | 45 | 22 | 61 |
| Station staff have a positive, helpful attitude | 26 | 52 | 28 | 46 | 27 | 48 | 21 | 54 | 20 | 64 |
| More staff available at stations to help passengers | 27 | 48 | 29 | 41 | 28 | 46 | 25 | 49 | 23 | 57 |
| More staff available on trains to help passengers | 28 | 47 | 30 | 40 | 29 | 45 | 24 | 50 | 24 | 57 |
| Better mobile phone signal on trains | 29 | 42 | 24 | 60 | 25 | 51 | 29 | 31 | 29 | 22 |
| Free Wi-Fi available at the station | 30 | 36 | 26 | 53 | 30 | 44 | 30 | 25 | 30 | 19 |

# Rail passengers' priorities – passengers with a disability

| | Any disability | | Mobility or wheelchair | | Hearing | | Eyesight | |
|---|---|---|---|---|---|---|---|---|
| | Rank | Index | Rank | Index | Rank | Index | Rank | Index |
| Reliability and punctuality | 1 | 235 | 1 | 230 | 1 | 238 | 1 | 227 |
| Price of train tickets offers better value for money | 2 | 224 | 3 | 216 | 2 | 219 | 2 | 217 |
| Passengers able to get a seat on the train | 3 | 212 | 2 | 218 | 3 | 216 | 3 | 197 |
| Trains sufficiently frequent at the times I wish to travel | 5 | 145 | 5 | 142 | 7 | 139 | 4 | 145 |
| Train company keeps passengers informed about delays | 4 | 146 | 6 | 142 | 6 | 147 | 5 | 143 |
| Inside of train is maintained and cleaned to a high standard | 7 | 143 | 7 | 141 | 4 | 153 | 6 | 134 |
| Accurate and timely information available at stations | 8 | 132 | 8 | 129 | 8 | 134 | 8 | 131 |
| Accurate and timely information provided on trains | 9 | 121 | 9 | 116 | 9 | 122 | 9 | 119 |
| Well-maintained, clean toilet facilities on every train | 6 | 144 | 4 | 145 | 5 | 148 | 7 | 132 |
| Less disruption due to engineering works | 10 | 108 | 11 | 105 | 10 | 110 | 10 | 107 |
| Connections with other train services are always good | 11 | 100 | 12 | 100 | 14 | 96 | 11 | 97 |
| Journey time is reduced | 18 | 77 | 22 | 70 | 17 | 77 | 18 | 78 |
| Good connections with other public transport at stations | 14 | 90 | 15 | 91 | 15 | 85 | 14 | 87 |
| Seating area on train is more comfortable | 13 | 92 | 13 | 99 | 12 | 97 | 13 | 92 |
| Easier to buy the right ticket | 15 | 87 | 16 | 86 | 13 | 96 | 15 | 84 |
| Improved personal security on the train | 12 | 93 | 14 | 95 | 11 | 97 | 12 | 93 |
| More room to stand comfortably on busy trains | 25 | 64 | 26 | 57 | 25 | 58 | 25 | 69 |
| Improved personal security at the station | 17 | 79 | 17 | 81 | 16 | 82 | 17 | 80 |
| Stations maintained and cleaned to a high standard | 19 | 71 | 21 | 70 | 18 | 76 | 23 | 69 |
| More environmentally friendly journeys | 23 | 64 | 25 | 57 | 26 | 55 | 26 | 66 |
| Easier to claim compensation when delayed | 27 | 49 | 27 | 42 | 28 | 43 | 28 | 56 |
| Free Wi-Fi available on the train | 28 | 48 | 28 | 42 | 27 | 52 | 27 | 58 |
| Sufficient space on train for passengers' luggage | 26 | 63 | 24 | 60 | 20 | 69 | 19 | 77 |
| Train staff have a positive, helpful attitude | 20 | 69 | 20 | 75 | 19 | 71 | 20 | 74 |
| Access from station entrance to boarding train is step-free | 16 | 84 | 10 | 112 | 21 | 68 | 16 | 81 |
| Station staff have a positive, helpful attitude | 24 | 64 | 23 | 69 | 22 | 64 | 24 | 69 |
| More staff available at stations to help passengers | 22 | 67 | 18 | 78 | 24 | 61 | 21 | 70 |
| More staff available on trains to help passengers | 21 | 67 | 19 | 78 | 23 | 64 | 22 | 70 |
| Better mobile phone signal on trains | 29 | 35 | 29 | 29 | 29 | 36 | 29 | 42 |
| Free Wi-Fi available at the station | 30 | 29 | 30 | 26 | 30 | 29 | 30 | 36 |

## Bus passengers' priorities for improvement

| | Priority scores all age 20+ | Rank all age 20+ | Priority scores age 14-19 | Rank age 14-19 | Priority scores age 20-34 | Rank age 20-34 | Priority scores age 35-64 | Rank age 35-64 | Priority scores age 65+ | Rank age 65+ |
|---|---|---|---|---|---|---|---|---|---|---|
| Buses running more often than they do now | 259 | 1 | 247 | 1 | 199 | 3 | 267 | 2 | 316 | 1 |
| Buses going to more places you want them to | 245 | 2 | 187 | 6 | 202 | 2 | 246 | 3 | 298 | 2 |
| More buses arriving on time at your bus stop | 237 | 3 | 217 | 3 | 204 | 1 | 236 | 4 | 283 | 3 |
| Better value for money from bus journeys | 215 | 4 | 197 | 5 | 191 | 4 | 273 | 1 | 97 | 11 |
| More journeys on buses running to time | 212 | 5 | 171 | 7 | 180 | 5 | 214 | 5 | 245 | 4 |
| More effort made to tackle any anti-social behaviour | 156 | 6 | 139 | 8 | 155 | 6 | 157 | 6 | 153 | 6 |
| Faster journey times | 142 | 7 | 215 | 4 | 154 | 7 | 152 | 7 | 101 | 9 |
| More bus stops with next bus displays | 112 | 8 | 86 | 11 | 105 | 9 | 100 | 8 | 154 | 5 |
| Better quality information at bus stops | 85 | 9 | 75 | 14 | 89 | 13 | 78 | 10 | 98 | 10 |
| More space for wheelchairs and buggies | 82 | 10 | 65 | 20 | 113 | 8 | 71 | 14 | 69 | 16 |
| Drivers allowing more time for passengers to get to their seats | 82 | 11 | 56 | 25 | 71 | 20 | 77 | 11 | 107 | 8 |
| Cleaner and better maintained buses | 80 | 12 | 90 | 10 | 89 | 12 | 76 | 12 | 78 | 14 |
| More bus stops having shelters/seats | 77 | 13 | 48 | 26 | 62 | 25 | 68 | 15 | 118 | 7 |
| Being told of delays whilst on board | 70 | 14 | 80 | 12 | 91 | 11 | 64 | 16 | 60 | 21 |
| More tickets which allow travel on all local buses | 70 | 15 | 66 | 17 | 75 | 18 | 82 | 9 | 33 | 27 |
| More apps showing live arrival/running times | 69 | 16 | 95 | 9 | 104 | 10 | 64 | 17 | 38 | 26 |
| Free Wi-Fi more widely available | 69 | 17 | 223 | 2 | 85 | 15 | 73 | 13 | 42 | 25 |
| More comfortable seats | 69 | 18 | 59 | 23 | 66 | 23 | 62 | 20 | 88 | 12 |
| Improved ventilation and temperature control | 68 | 19 | 65 | 21 | 79 | 17 | 63 | 19 | 68 | 17 |
| Drivers showing more consideration for passengers | 65 | 20 | 67 | 16 | 63 | 24 | 64 | 18 | 69 | 15 |
| More audio-visual announcements of which stop is next | 65 | 21 | 66 | 19 | 80 | 16 | 57 | 25 | 64 | 19 |
| More personal space (whether seated or standing) | 64 | 22 | 77 | 13 | 71 | 21 | 59 | 24 | 65 | 18 |
| Better safety/security at bus stops | 62 | 23 | 71 | 15 | 69 | 22 | 62 | 21 | 55 | 22 |
| A smoother ride with less sudden braking or jolting | 61 | 24 | 43 | 28 | 53 | 28 | 56 | 26 | 83 | 13 |
| More buses accepting contactless/smartcard or mobile to pay fares | 59 | 25 | 66 | 18 | 85 | 14 | 60 | 22 | 24 | 29 |
| Improved route number/destinations shown on buses | 57 | 26 | 61 | 22 | 74 | 19 | 54 | 27 | 46 | 23 |
| A more suitable range of tickets for how and when you use buses | 52 | 27 | 58 | 24 | 61 | 26 | 60 | 23 | 21 | 30 |
| Making it easier to step onto and off of buses | 49 | 28 | 34 | 29 | 54 | 27 | 43 | 28 | 61 | 20 |
| Drivers communicating better with passengers | 41 | 29 | 45 | 27 | 44 | 29 | 40 | 29 | 42 | 24 |
| Better maintained bus stops | 26 | 30 | 31 | 30 | 32 | 30 | 24 | 30 | 25 | 28 |

## Non-user priorities – by age

| | Priority scores all ages | Rank all ages | Priority scores age 14-19 | Rank age 14-19 | Priority scores age 20-34 | Rank age 20-34 | Priority scores age 35-64 | Rank age 35-64 | Priority scores age 65+ | Rank age 65+ |
|---|---|---|---|---|---|---|---|---|---|---|
| Buses going to more places people want them to | 313 | 1 | 235 | 1 | 259 | 1 | 316 | 1 | 428 | 1 |
| Buses running more often than they do now | 212 | 2 | 174 | 3 | 196 | 3 | 216 | 3 | 249 | 3 |
| Better value for money from bus journeys | 209 | 3 | 197 | 2 | 227 | 2 | 225 | 2 | 159 | 4 |
| Buses stops closer to home/destination | 170 | 4 | 113 | 6 | 116 | 8 | 165 | 5 | 289 | 2 |
| More bus services running on time | 165 | 5 | 149 | 5 | 177 | 4 | 169 | 4 | 148 | 5 |
| Faster journey times | 151 | 6 | 157 | 4 | 171 | 5 | 158 | 6 | 106 | 6 |
| More effort made to tackle anti-social behaviour on buses | 121 | 7 | 113 | 7 | 130 | 6 | 123 | 7 | 106 | 7 |
| Live bus times available on a smartphone | 85 | 8 | 101 | 9 | 119 | 7 | 78 | 9 | 41 | 11 |
| Buses running earlier/later in the day | 81 | 9 | 77 | 11 | 85 | 9 | 86 | 8 | 65 | 8 |
| Paying fares by mobile/contactless card | 56 | 10 | 83 | 10 | 77 | 10 | 49 | 11 | 24 | 17 |
| Easier to get info on bus routes and timetables | 50 | 11 | 55 | 13 | 56 | 11 | 49 | 10 | 39 | 13 |
| More comfort on buses | 46 | 12 | 53 | 14 | 47 | 13 | 46 | 12 | 43 | 10 |
| Cleaner buses | 43 | 13 | 50 | 15 | 48 | 12 | 42 | 13 | 32 | 15 |
| Drivers showing more consideration to passengers | 40 | 14 | 49 | 17 | 39 | 15 | 39 | 14 | 40 | 12 |
| Easier to get onto and off buses | 39 | 15 | 41 | 18 | 34 | 16 | 37 | 15 | 50 | 9 |
| Easier to get fares information | 38 | 16 | 50 | 16 | 42 | 14 | 37 | 16 | 26 | 16 |
| Special fares for teenagers | 30 | 17 | 108 | 8 | 23 | 19 | 20 | 19 | 13 | 18 |
| Bus companies getting more involved in the local area | 27 | 18 | 36 | 19 | 25 | 18 | 23 | 17 | 32 | 14 |
| More technology on board (Wi-Fi and charging) | 26 | 19 | 59 | 12 | 30 | 17 | 21 | 18 | 10 | 19 |