

fflecsi: Demand Responsive Transport

Interim agency report: February 2021



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This is an interim report on work done to date, which does not include fieldwork in Newport due for completion in March 2022



Introduction

Project context

Demand Responsive Transport (DRT) and Integrated Responsive Transport (IRT) have been introduced in recent years by some operators and local authorities as flexible bus services. DRT is shared public transport where the vehicle alters its journey according to passenger need without a fixed route or schedule. IRT is similar, but involves a demand led service integrating closely with existing commercial service providers (bus, coach or train) and plugging gaps in services

In some cases around the UK, flexible bus services have been introduced where a bus service was commercially unviable, providing an option to retain a public transport service and allow economic and social inclusion. However, flexible bus services are also seen as having the potential to be a public transport solution for a wide variety of users and trip types, from leisure to school, to tourism and shopping, and for all types of people irrespective of whether they are current users or not

For Transport for Wales (TfW), fflecsi is intended to be a complementary part of the public transport mix in an area, and to appeal to the widest possible demographics. fflecsi has the flexibility to fit in with either DRT or IRT approaches, and is being trialled in a number of areas across Wales. In each area, the offering is slightly different, and providers range from bus and coach companies through to community voluntary organisations who had previously provided Dial-a-ride services; this has allowed a wide range of scenarios to be piloted

This original activity was in response to a general decline in bus use that made some specific routes commercially unviable. Such issues have grown in relevance since the onset of the pandemic

With this in mind, Transport Focus Wales is working with TfW to examine the user experience of a number of schemes currently in operation or soon to be introduced in Wales, in particular that in Newport, in order to help TfW understand how best to roll out fflecsi as part of the network across Wales

In order to allow the Newport operation to bed in post launch, fieldwork in that location will take place in January and February 2022, therefore this is an interim report to feed back on findings from the other locations in the study. Subsequently, Newport findings will be fully synthesised with this report to provide overall conclusions



Research objectives

This research is intended to be exploratory with a view to improving the services (where required) and promoting their use more widely. To achieve this, we need to understand both passengers' experience of fflecsi services as well as why other potential users have not adopted such services

Specific areas for the research to explore in detail include:

- User feedback from passengers
- Reasons for rejection by potential users
- Explore why those (both with and without access to a private car) who might make use of fflecsi choose not to do so and what might make the service more attractive
- Collect views and understand the differences in experience and ambitions of a range of passenger types
- Benchmark the Welsh fflecsi operations against selected flexible bus services in England
- Collect views from operators and local authorities about their experience, including successes, challenges and failures of DRT/IRT services in their area

The research was carried out during a time of various pandemic restrictions across England and Wales which means that no services were running to their full potential. The pandemic also caused issues with initial set up of the various schemes, as well as willingness to ride amongst potential passengers.



Method and sample: Total 48 respondents and 10 stakeholder interviews

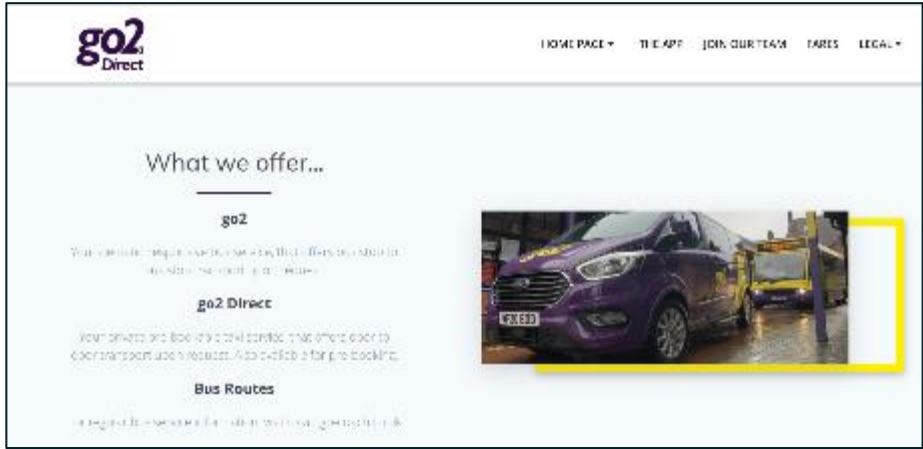
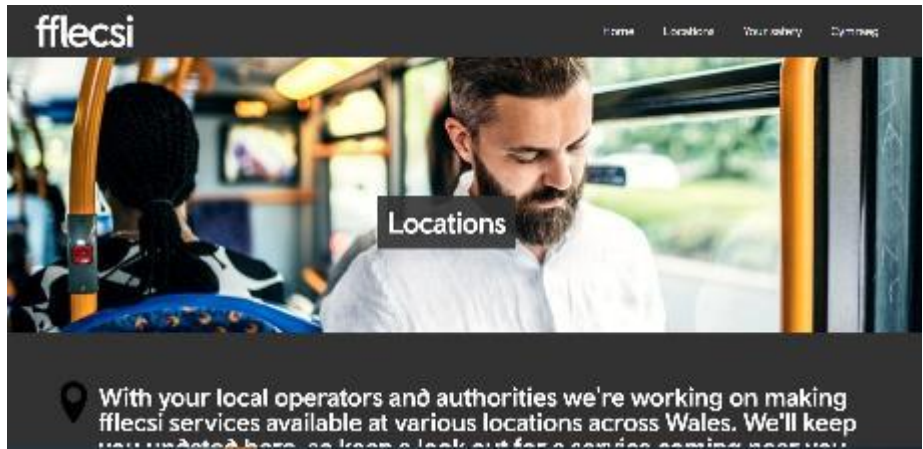
60-minute sessions via Zoom or telephone, primarily one on one, but 5 friendship pairs

- 10 x 30 minute stakeholder interviews with authorities and operators of participating and non-participating areas (Conwy Valley, Denbigh, Gwynnedd, Pembrokeshire, Sevenoaks, Swansea, Tees Valley)
- Fieldwork undertaken to date took place in two tranches, half in March 2021, and the remainder from June to August 2021, and reflects the experiences in the lockdown/alert level status at those times. Pembrokeshire fieldwork took place prior to Bwcabus integration.

Wales		Total complete	Male	Female	U25	26-45	46-59	60+
Conwy Valley	Users	3	1	2				3
	Potential Users	5	3	2	2	1	2	
Denbigh	Users	5	1	4		4		1
	Potential Users	5	3	2		3	1	1
Newport (TBC in Jan-Feb 2022)	Users							
	Potential Users							
Pembrokeshire	Users	5	1	4	1		2	2
	Potential Users	4	2	2		3		1
England					U25	26-45	46-65	70+
Sevenoaks	Users	6	3	3		2	3	1
	Potential Users	6	3	3	1	4	1	
Tees Valley	Users	5	3	2	1	1	3	
	Potential Users	4	3	1		2	2	

Further sample detail in notes pane below

Stimulus: all users and potential users pre-tasked to look at the appropriate website for the service in their area



Designed to explore comprehension and take out, as well as warming up potential users to the idea of the service if they had less prior knowledge

The services studied within this project



Conwy Valley

- Replaced local bus services 19 (between Llanrwst – Cwm Penmachno only) 42, 68A, 68B, 68C, 68D and 70
- Designed to link in with other bus services and the railway stations on the Conwy Valley line
- Hub centred on Llanrwst, with occasional links to Corwen
- Operator is a coach company



Denbigh

- Focused on Denbigh town itself – addressing issues of steep gradients and also poorly connected outlying housing estates
- Also covers village of Henllan
- Replaced service 66
- Operator is a coach company



Newport

- Fieldwork to be completed February 2022



Pembrokeshire

- Operates across three zones within the north west of the county
- Flexible, but with some guaranteed arrival/departure times on certain days in certain areas
- Operated by Pembrokeshire Voluntary Transport
- Post fieldwork has integrated Bwcabus as a fourth zone



Sevenoaks

- Sevenoaks and surrounding area
- Mixture of minibus and private hire vehicles
- Turned whole service network over to DRT at the beginning of the pandemic
- Significant commuter demand for links to Sevenoaks station (services to London)
- Operated by local bus company



- Operates within the area of the Tees Valley mayoralty
- Flagship project of the mayor
- Operates between primary and secondary destinations across three zones
- Operator is the local bus company

Headlines

Headlines

Flexible bus services are attractive to a wide range of people

- There is a range of passenger groups for which flexible bus services make more sense and there is interest
- As a specific demographic sub-group within these (i.e. the isolated and the less mobile), they are a vital and lifechanging service
- However, for all, there is a need to increase awareness of the offering, and ensure understanding of how it works

Other groups are harder work to convert

- Those with cars tend to continue to default to that as the option – unless there are compelling reasons to change
- Those with deadlines, or unpredictable/anti social working hours, do not feel that flexible bus services would currently help them in most locations

Overall satisfaction amongst users is high

- Key elements are: Offers flexible timings, a more bespoke service, and the sense of the service as taxi like
- There are some who are less keen, and lament the loss of their scheduled service where IRT/DRT has been a replacement

There are clear key success criteria for further roll-out of flexible services

- Strong alignment between authorities and operators on what makes a successful service
- Overall, a successful launch relies on partnership (between authorities/operators, and between them and the public) allied to strong local knowledge

Learning from authorities and operators

All participating authorities and operators can see the benefits of flexible bus services in providing a service to people in their area

A valuable addition to the service mix

- Can replace services in areas where the buses were typically seeing lesser usage
- Makes more intensive use of vehicles – so can represent a better return on investment
- Opens up access to public transport to people who were not previous included
 - Less able/mobile
 - Those further away from bus routes
 - The elderly and those without access to vehicles more generally

It runs to the parts where traditionally bus services haven't been that great, so it is reaching new markets. [Operator, England]

Also, with the carbon agenda having a bus going round with no one on it is not a great look, so you want something more efficient. I knew the basics of what it was but at the start we didn't really know too much about how it might work – but we volunteered! [Authority, Wales]

But there are limitations

- Not the 'cheap option'
- Part of the future transport mix, but not the only part
 - Might encourage some people to stop using their cars, but in rural areas unlikely to completely stop them
 - When there are enough people needing a service then there's the business case for a fixed line scheduled service
 - Generally think more in terms of DRT initially, as IRT feels more complicated

In the rural areas there needs to be a range of options – making the fixed lines that go up to the coast more regular, fflecsi, car clubs, basically giving people as many options as they can to feel comfortable giving up their car. At the moment they're still isolated. It ticks a lot of boxes, but they're still isolated. [Authority, Wales]

DRT has greatest role in expanding access to public transport – there is more concern about using it to replace other services, and all want to communicate it as an addition to the transport mix

Most authorities and operators had an awareness of flexible bus services before launch, but had not looked deeply into them

Authorities typically investigating to see if it can enhance viability

- Typically looked at in terms of enhancing or maintaining service access and/or provision with economic benefits, and interest in if it will save money
- **Denbigh** had experimented with flexible bus service solutions from 2008
- Most now have more of a recognition that when done properly they don't necessarily save money because of investment required in apps and call centres
- Also (especially in England) an awareness that there have been a number of high profile failures of DRT, so had wanted to research why those schemes had not been successful before committing

Probably a number of years ago, when public transport came into our section. We'd become aware that this sort of thing was available and we were looking at the viability of a couple of services in our more rural areas. When they wanted to do a pilot in that sort of area it was good timing for us. [Authority, Wales]

Operators much more likely to be thinking of their own futures

- Especially during the pandemic DRT services represented an additional income stream and way of utilising their staff for some operators
- Belief that flexible services represent the future (or at least part of the future) so value in getting involved now to understand how it all works rather than being left behind
- Ultimately commercial decision to get involved

It's innovative, something new. We wanted to give it a go. We've tried electric vehicles because we don't want to get stuck in the mud. I don't think we had any concerns. We're used to ride apps, we had trust in ViaVan that it would work. No problem or worry there. [Operator, Wales]

While the spur to research had typically been to see what benefits it brings authorities, both they and operators are now clear that there are costs to a flexible model. It can be more expensive than a scheduled service, but is the right thing to be offered to engage and stay relevant for the future

For the Welsh locations, the trigger to going ahead has been the pilot scheme starting

TfW's pilot schemes overcame some of the previous barriers

- When authorities and operators had looked at flexible bus services before, they had been deterred by the expense of the app and call centre requirements, though Denbigh was experimenting
- TfW assuming responsibility for these made the finances stack up
- Also a sense that services could be extended and enhanced for the people of their areas if they went ahead
- In the **Tees Valley**, the influence of the mayor in making DRT one of his key policies provided further impetus

At the moment TfW are funding the app and the call centre and we feel that's best done nationally. If ever we were forced to fund those elements, then my fear is all the benefits we're gaining would be lost. [Authority, Wales]

Reasons for not going ahead with fflecsi from non-participating authorities

- Wrong timing – interested but not able to proceed at that time (lack of finance/will, etc.)
- Belief that more urban areas are better served by fixed line bus routes due to
 - Volume of passengers
 - Existing relationships with long term operators
- Some concern that it can be seen by the public as a withdrawal of service where a flexible bus service is replacing a fixed route
- Lack of knowledge of the fflecsi pilot proposition
 - As they hadn't gone ahead, they had been less immersed in the scheme and therefore less clarity around the support that TfW was offering – questions around who is operating the call centre, the app, etc.

Not really been on our radar because we're urban and a lot of our services are commercially operated – we do have outlying areas, But because of the numbers travelling at certain times I think DRT would be difficult for the core services. [Non-Participating Authority, Wales]

I think we probably would look again at DRT in the future but in terms of setting it up and the back office we wouldn't be able to take it on. We'd have to have a lot of support to enable us to do it. [Non-Participating Authority, Wales]

The 'back office' technology and staffing requirements are such that no authority thought they would be offering fflecsi without TfW's current support – and non participating authorities are not clear on whether TfW would be supporting those elements (further reinforcing why they haven't taken part)

Once they had decided to press ahead, the level of co-operation and working relationship with TfW was praised

Authorities found TfW flexible and approachable

- Most thought that the levels of support offered during the set up process were appropriate, though there were some concerns that the speed of set-up and effects of the pandemic meant that the services went live without a full understanding of what the technology can and can't do

TfW have been really helpful with this project, in terms of promoting it they've been really good. I don't think we need more from them, just keep doing what they're doing. A lot of money is going to have to be spent on roads and the infrastructure because a lot of them round here are not cut out for buses. Getting on a bus can see an hour taken out of your life really quickly. [Authority, Wales]

Operators typically faced prescriptive tenders for the service level required – routes, hours and pick ups

- Typically restricted by tenders in terms of hours and routes

We did have to tender and it was quite prescriptive in terms of what they wanted us to do. That was mainly down to the LA and TfW but they did ask our advice about logistical things – can you go here? Mainly about roads and accessibility. I don't think we were able to consider anything else in terms of solutions. Old fashioned tenders had a lot more room to adapt things but without a timetable there's nothing you can really do to adapt. It's all on mileage. [Operator, Wales]

Belief that in future areas the process will be smoother because TfW now has experience of rolling out fflecsi, but that the key learnings are to take time with each area to think through how the services will run

Though there were concerns around how long things take to be signed off by TfW

Some comments around the TfW 'brand police'

- Key concerns were on the time it was taking to get sign off on branded signage for vehicle interiors, and wider marketing collateral – potentially as a result of the pandemic
- Concerns that some signs would be out of date by the time they were received
- At the same time, operators tended to value the fflecsi brand itself, as the service doesn't impact on their own brand (whether positively or negatively)

It's good not having our name plastered all over it – because then any phone calls or that go through someone else. From an operational point of view that's a big advantage. We just deal with the drivers. [Operator, Wales]

I don't think they're very quick at making decisions. We're doing as much as we can locally promoting it but it takes a while to get any input from TfW and back again. That relationship with the marketing side of things could be quicker. But we're getting more and more access to things so that we can do them ourselves without having to wait for TfW. [Operator, Wales]

While most are happy overall with the relationship with TfW, speed of response is the one area that could be looked at as the services develop and mature (or are launched elsewhere)

Implementation has been hard work, but successful, with stakeholders keen to see how the service in their area develops over time

Typically a lot of work to get the services off the ground

- Operators and authorities typically felt that they could have had longer to refine the offer before launch (especially in terms of the additional pressures of the pandemic), and faced a range of challenges from defining routes through to choice of app partner
- Welsh locations feel that TfW generally helped them through the process, and were keen to provide support and guidance
 - Typically all thought that if they were launching again in another area it would be smoother now they've done it once

I suppose it's fair to say that we did this in something of a rush. Nonetheless, it was made relatively easy for us by TfW. The only real teething problems were right at the beginning, and when we changed from one contractor to another – that was resolved within 24 hours. [Authority, Wales]

DRT/IRT requires a different mindset

- With a scheduled service, once it is up and running it runs itself
- DRT requires more time and dedication to get right
 - Drivers have more of an input and need to use their initiative
 - Can't be seen as a 'normal bus service with an app' (and belief that this is where flexible services have fallen down in the past)

You need to keep an eye on it all the time, it's not like running fixed lines because if you get those right you don't know you're doing it. DRT needs to have its hand held, stroke its back, make it feel loved. [Operator, England]

Most felt that they had come up with something that worked for their area, but that they would need to keep things under review and continue to develop the service as time goes on

Both operators and authorities see the role of the driver as crucial to the service

The people who are the public face of the operation

- Public face of the operation, and all seem enthusiastic so far
- Also need to be able to use their initiative when the route given to them by the system doesn't align with the best route in reality

Comms with the drivers is the key, it's got to work for the drivers and the customers – the schedule tells them to do one thing, and the driver thinks it's stupid. [Authority, Wales]

Secondary role as troubleshooters

- Reports from all areas (in March 2021) of drivers helping passengers with the booking process and acting as a voice of reassurance with the more vulnerable who are concerned about their return journey
- Suggestion that the drivers should be able to book people on at the roadside if they're obviously in need of a bus journey

The drivers have been fantastic on this service, brilliant, for the older people who struggle to book a return journey the drivers are doing their own thing and I think that's very important. It's not going to succeed without that sort of re-engineering. [Authority, Wales]

The app and the call centre are important to the success of the proposition, but the drivers are the difference between an adequate and a great journey - this reinforces findings from previous projects around scheduled services, including 'Getting People Back on Buses'

Some learnings around the fflecsi route set up process

More time would have been valued to understand the flexibility of the fflecsi app

- Lack of understanding of how flexible the proposition can be initially – meaning that zones of operation and stops have evolved since launch

Request for more involvement from some operators in the fflecsi set up process

- Local knowledge identified as crucial in siting pick up points, though the general feeling is that both TfW and ViaVan have worked hard with their partners to devise solutions

I feel that we've got to understand the ViaVan system. When it was set up it wasn't really explained to us how it worked, so we did a whole load of work in a vacuum. Then the service started and it didn't really fit. Also the system allowed us to be more flexible than we'd been led to believe. TfW took it on themselves to set up all the virtual stops. I'd assumed, because we'd been asked for a list, that that had all been done, and it hadn't been. TfW were thinking 'we can take that off their shoulders' but they missed out on the local knowledge. The way that the stops are named, doesn't help users. It'll say 'post office' but not the name of the village! [Operator, Wales]

Some operators and authorities believe they have been able to tweak their services since launch, and would have valued more time to trial things in retrospect (though the pandemic restricted this)

Hours and days of operation driven by three key factors

What is it replacing

- Where flexible bus services are taking over from scheduled routes the benchmark tended to be to cover at least the same hours of operation

It runs 0700-1900 and it's very rare you have people straight away. You've got a cohort at 0745/0800 ish. As we go into stay local rather than stay at home the traffic builds up between 10-12, then dies down then up again, then really peters out into the evening. [Operator, Wales]

Likely demand

- When people have historically wanted to travel
- Where they have wanted to travel at those times
- Pandemic considerations – typically in March service offering had been affected by various Stay at Home instructions and other factors having an impact on usage patterns

Been interesting on days and times. Market day, Thursday, is really popular, and Saturdays, then there's other days no one seems to be travelling. There's one day when it hardly gets used. If I ever was going to set up an event Tuesday's a quiet day! [Authority, Wales]

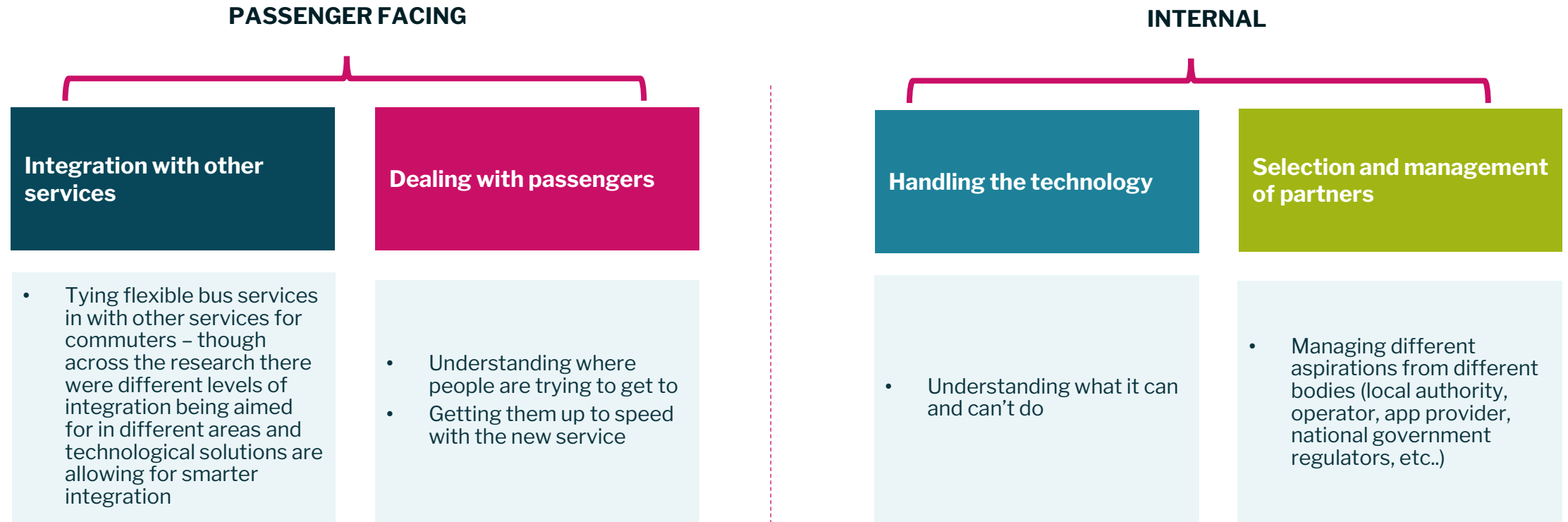
Economics

- Determines the number of vehicles available
- Determines what they can be scheduled to do
- Within that, judgment made on what level of likely demand is small enough to be discounted as uneconomic

You can't just have them driving round saturating the area, there's got to be a point where economics kicks in. [Operator, England]

Flexible bus services are seen as providing inherently more flexibility than a scheduled service – and any service at all in some areas not previously served: however operating days and hours are affected by demand and what the authorities and operators can do for a given level of investment

Specific experiences varied across the different areas, but unexpected challenges fell into four themes, which might be useful for planning and consideration for other operations in the future



Depending on the area or Wales or England, these cover both internal and external areas for consideration but the themes are useful when looking at future service roll out

Passenger facing: integration with other services

Seen as a positive thing to aim for

- Some areas do tie in with the railway stations and use flexible bus services to bring passengers into the fixed line services
- But initial suspicion reported from other operators that it was about stealing their passengers, not joining services up

But recognise that the key is providing passengers with trust

- Flexible bus travel can work to tie into onward services, but the key concern is whether other pick-ups along the way will disrupt arrival times – so need to think how to achieve this/communicate this to would be users

Scope for more integration

- Some authorities do have a sense that there is value in being more joined up, so looking at whether the app can show which trains a service can meet, etc.
- In other areas, support for the app being able to show scheduled services as an option at booking if they're going to be quicker

Integration – we've tried to set it up to link in with the fixed services as well as the railway – the stations are a key point for us. Because the fflexcsi operator isn't the operator of the other services we need to get the trust that we're not trying to replace those services. They think we're encroaching on their patch, or they did at the start. We see it as a way of increasing the passengers on those services but because it's quite new it needs to be reassuring. It's about improvement not replacement. There's more to do but it will be key that it all links together. [Authority, Wales]

We do want to tie things in more – we're talking to the train companies, we're looking at whether the app can show the trains that we can meet. [Operator, England]

All can see the value in integrating with other services (and looking at through ticketing) but it needs to be done in a way that gives confidence to the user

Passenger facing: key challenges in understanding where people want to get to, and ensuring that they can access the service

A key challenge is working out the demand flows

- Knowing who is likely to travel and where from/to
- Understanding (at a high level) what the journeys people want to make are
 - This sets service boundaries
 - Creates more tension in larger areas with more than one hub, or those which have multiple internal areas as more demand for cross border/zone travel
- Tendency initially for users to replicate the old flows of scheduled services, e.g. more travel on market day, but this is changing over time as more users come in, typically creating peaks in the morning and evening across the week

One of the things we've learned is you can't assume that you know where people want to go. Traditionally people have used bus services because they've had no other choice. If it doesn't go where they want to go then they haven't used it, whereas DRT will open up other markets. In the long term I think that there could be a commercial model in this, fares strategy will be a big part of that. But it's not a one size fits all model.
[Operator, England]

Getting the passengers up to speed

- Introducing current passengers to the flexible proposition
- Ensuring that they can use the app/make bookings so limiting disruption to their normal travel
- Promoting the service to new users

As we move forward over the next couple of years there will be more people over 60 comfortable with the technology so we're moving in the right direction but we must never forget the people who struggle with technology.
[Authority, Wales]

Most areas felt that they had a greater understanding of travel patterns within their area now that DRT/IRT services exist than they did beforehand. Onboarding users has been more challenging, and relied on a lot of patience from drivers in explaining how things are going to work

Internal: handling the technology

Understanding what it can and can't do

- Some sense that operators and authorities have yet to discover everything that they can do on the ViaVan app
- Belief that ViaVan has been on the same journey as them in terms of getting DRT/IRT to work in a non-urban setting – big difference between New York and Denbigh

And recognition that it's not a silver bullet

- Demand-based app hailing of buses ought to work well for a lot of people, but there will always be places where volume is high enough that a scheduled service will make more sense
- Technology doesn't solve all the problems – people still may not be able to access it, or may prefer a fixed line service (so attitudinal rather than access)

We've learned a lot about how DRT works. I think Via would tell you they've learned as well – especially about the demographics of a more rural population and service. They were very keen to tell us originally about how they had a couple of thousand vehicles in Manhattan. Well, that's not here – it's a different aggregation of customers, geography, population density. I think also people make more disparate journeys here because their destinations are more varied – and all in different directions.
[Operator, England]

A steep learning curve, but excitement about the possibilities

Internal: selection and management of partners is crucial

Selection of partners

- Across the areas, one LA had changed operator, and one changed app provider before launch
- A learning curve for all involved and important to have the right relationships in place – praise for TfW in providing guidance
- Additional challenge in **Pembrokeshire** managing a community organisation getting involved in a wider service for the first time, though this is now working well

The initial award was September 2019, we were supposed to launch before Christmas that year, but we ended up pushing it back to February 2020. It was a bit bumpy to get there because we engaged with two separate suppliers on the tech side and both fell through at late stages. [Operator, England]

Some tension between what the area want, and what TfW wants

- Where split between whether the solution was IRT or DRT, the result has been something broadly in the middle arrived at through negotiation between authorities and TfW

We've had to be quite scheduled and that ended up with few people travelling. Over time we've changed that, the schedules and routes to make it more flexible and open it up to other people. I don't think we're there yet with commuting but we're trying. We have seen an increase in fare paying – adults and school pupils. [Authority, Wales]

Care needs to be taken to select the right partners, and also to manage non-involved partners (especially other operators) so that they can understand how DRT/IRT works and where it fits into the landscape

Impact positive overall, but there are some passengers whom fflecsi doesn't suit

Most users like it – especially where they previously had no service

- Provides them with a service that is more flexible
- Some people now have public transport provision for the first time
- Belief that overall passengers find the software easy to use, and contacting the call centre straightforward
- Works for shoppers, should work for tourists as things open up, can work for commuters but needs to be reliable for them so they're a bit further out
- Can work for schoolchildren, but volumes of those might point in the direction of a larger bus, and with both them and vulnerable people there are issues around Disclosure and Barring Service checking, and segregation requirements

But some concerns surfacing – particularly from some older, established users

- Belief that some older passengers have ceased using (though difficult to tell how much this is the pandemic and how much loss of scheduled services) because they don't like thinking ahead or using the technology

New users coming aboard in all areas

- All areas report that there are now passengers riding who didn't previously use the buses, which makes them hopeful for the post pandemic future

App feedback, up to now pretty much well done. Average response is 4.9 out of five, which is 98%, if this was a normal bus operation then people would bite your hand off for that. [Operator, England]

I think we've noticed over the first 5-6 months that the people using are not the people who used the bus in the past. They have been using it to go to work. Those who used the old services are the people who have been shielding. It's going to be interesting to see if they come back. It sounds like they will but for them it's quite a big change. [Authority, Wales]

Overall, operators and authorities were happy with the uptake to date (especially given the pandemic suppressed demand at launch) - however, all were wary of suggesting that it is the right solution for all types of passenger

General air of frustration around the pandemic

- Has been a tricky time to be launching a new type of service
- Has depressed potential passenger numbers – at least until things started to open up again
- Has restricted the ability to market or promote a new travel service when the message from government has been at times ‘stay at home’ and only travel when necessary

We had great aspirations at the start – tourists, supporting the coastal buses, but then the pandemic came along. But we are really hoping that we can push/sell to visitors. We're going to engage with everyone we can to find out the best ways of selling/promoting the service to visitors.
[Authority, Wales]

When the operator and authority interviews were held in March, there was a feeling from Welsh respondents that the fflecsi proposition hadn't yet been tested in a 'normal' travel environment – particularly in **Pembrokeshire** and the **Conwy Valley** where there were hopes for tourist use



Though this has also brought some advantages

Upside to initial demand being depressed

- Meant that mistakes could happen on initial services (particularly around routing and timings) without impacting large numbers of passengers
- Also some feeling from the Welsh respondents that the pandemic initially made people more forgiving of teething problems in the early days because more spirit of pulling together/willing to make allowances in an emergency

in some ways we've been quite lucky with Covid because we didn't get a huge volume to start with and we could get through the first few weeks. [Authority, Wales]

If it had been a normal start then I think probably we'd have had more complaints than we did. [Authority, Wales]

What the pandemic has shown for future launches is the benefit of taking things slowly, thinking them through, and allowing people to make mistakes initially

All want it to succeed, and be part of the mix in their area going forward

Ideally an ongoing part of the local transport mix

- Across areas the hope is that the services bed in and are used and valued – sense so far is that most users are positive
- Authorities would welcome clarity on ongoing support from TfW for fflecsi
- There are opportunities to expand/extend services but this needs to be done organically and driven by local demand
- Overall sense from interviewees that DRT/IRT has the greatest role to play in predominantly isolated or rural areas where it can answer the limited demand, or in getting people from those locations to a fixed route to feed into scheduled services
- Also can be used to avoid hub and spoke services by running between two spokes

Sevenoaks has been particularly dynamic in service delivery since launch

- Initially turned all their routes over to DRT at the start of the pandemic – designed to cope with reduced passenger numbers and flexible enough to take whoever wants to travel where they want to travel to
- Has expanded operating hours as things have opened back up
- Moving into smaller vehicles that can be driven with private hire licences, not just minibuses

TfW isn't always clear about what the future is. We don't really know. We know they're potentially costlier than conventional services but you have to weigh up the costs against the benefits. It worries me that we'll make these advances and then get it pulled out from underneath us. [Authority, Wales]

Right from the start we wanted to do something differently – we were going to run much smaller vehicles for commuters. Then we were going to SEND schools, during the day we managed to get the majority of the transport for the local Age UK day centre (though that hasn't happened because of Covid) and also some of the really rural fixed line routes that were carrying next to no one. [Operator, England]

Most thought that fflecsi could expand into other areas in Wales, but (pre Newport fieldwork) there was more of a question mark over how well it would work in more urban areas. Where possible, it will be beneficial for services to be able to track and respond to demand in their area as quickly as possible

Key success criteria for DRT/IRT sit in three areas

Know your area

- Tightly defined area
- Know when people want to travel and where they want to travel to

Work together with all parties

- Have services where replacement with DRT/IRT would be an improvement for both passengers and operators
- Build and maintain good relationships between operator and other partners – as has been done to date
- Empower drivers to make decisions on a day to day basis

Keep the offer simple

- Have little variation in service times across the week
- Clearly explain to target market how it works
- Run promotion of the service in local media and to current passengers

Though they have been affected by the timing of launch, stakeholders believe that success for a DRT/IRT service rests on getting the basics right, from defining the area, through empowering all parties, to how it's explained to the end user. Our research with users and potential users bears out the three pillars above

Users and potential users

Triggers and barriers to take up and use

Overview: Respondents in all areas researched to date had similar views and their behaviour was impacted by the pandemic restrictions

There is strong alignment between users and potential users across areas

- Users and potential users talked about the same triggers and barriers to using flexible bus services in their area
- Points of divergence were far more likely to come about based on age or lifestage than location

At the moment need rather than choice is driving usage

- Given the timing of the research during the pandemic, usage in all areas has been limited by the impact of that on people's need to travel/make journeys (or not)
- Of those making journeys:
 - Some make the decision to use the flexible service because it offers advantages over other transport that they have access to
 - But most users have been travelling on the flexible service because they have no other choice/alternative
- Similarly, potential users (though their awareness of flexible services is variable), have not yet had the need to try the service

Note: Does not include **Newport** (findings TBC)

Different transport options selected based on specific considerations at the time of use

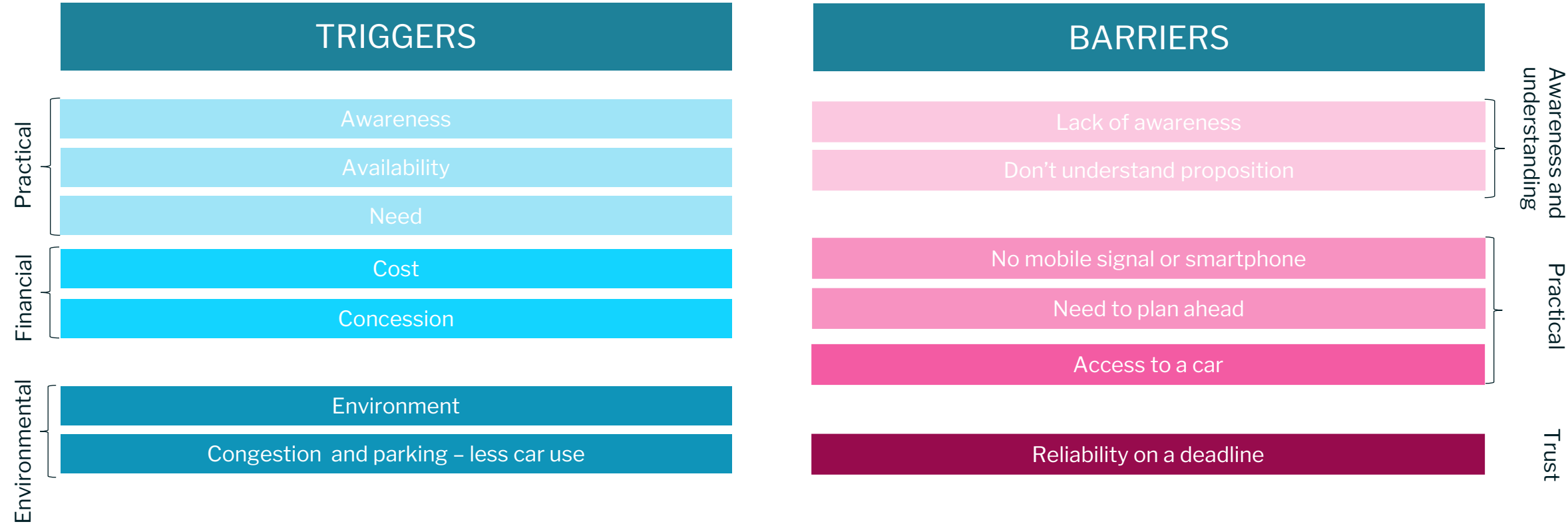
Car (for car owners)	Bus	Train	Taxi
<ul style="list-style-type: none"> • Immediately available • Convenient • In charge of own route and own times • More safe in the pandemic • Can carry items/purchases door to door 	<ul style="list-style-type: none"> • Short distance travel • Good for commuting and leisure trips • Economical 	<ul style="list-style-type: none"> • Longer distance journeys (to other towns/cities) • Commuting • But more expensive 	<ul style="list-style-type: none"> • More rural areas with fewer options • Night services/out of hours travel • But expensive and not the first choice for any
<p><i>I use my car because it's there. I don't have to book, you know it's just there. It's a case of laziness. Also, taxis don't want to come out this far at all. [Male, Current User, 57, C1, Tees Valley]</i></p>	<p><i>To save petrol we do take the bus or the train to get to places. If we don't have to drive then we won't. You'd want public transport for trips out drinking. Maybe in Conwy – we're not going to drive home after a busy day of drinking. [Male Pair, Potential Users, 21 & 22, C1/2, Conwy Valley]</i></p>	<p><i>I use the train to go up to London, which I have to do from time to time. [Mixed Pair, Potential Users, 41 & 39, BD, Pembrokeshire]</i></p>	<p><i>When we both worked in Betws people would ask if there are any taxis or buses and there aren't many options – now they've got this it's really good. [Male Pair, Potential Users, 21 & 22, C1/2, Conwy Valley]</i></p>

Choice of travel is influenced by accessibility, and the reason for travel – flexible services fit most closely with typical reasons for choosing a scheduled bus, but overlap with some car journeys

Trains typically thought of for longer distances and getting into the heart of cities – less scope for flexible bus services to be an alternative to them but do play an important role as potential feeders of passengers to the rail network

DRT/IRT can be an alternative to taxis for night services and on price (subject to hours of operation) but loses out against them for urgent journeys at short notice

A consistent set of triggers and barriers to use of DRT/IRT services exists in all areas



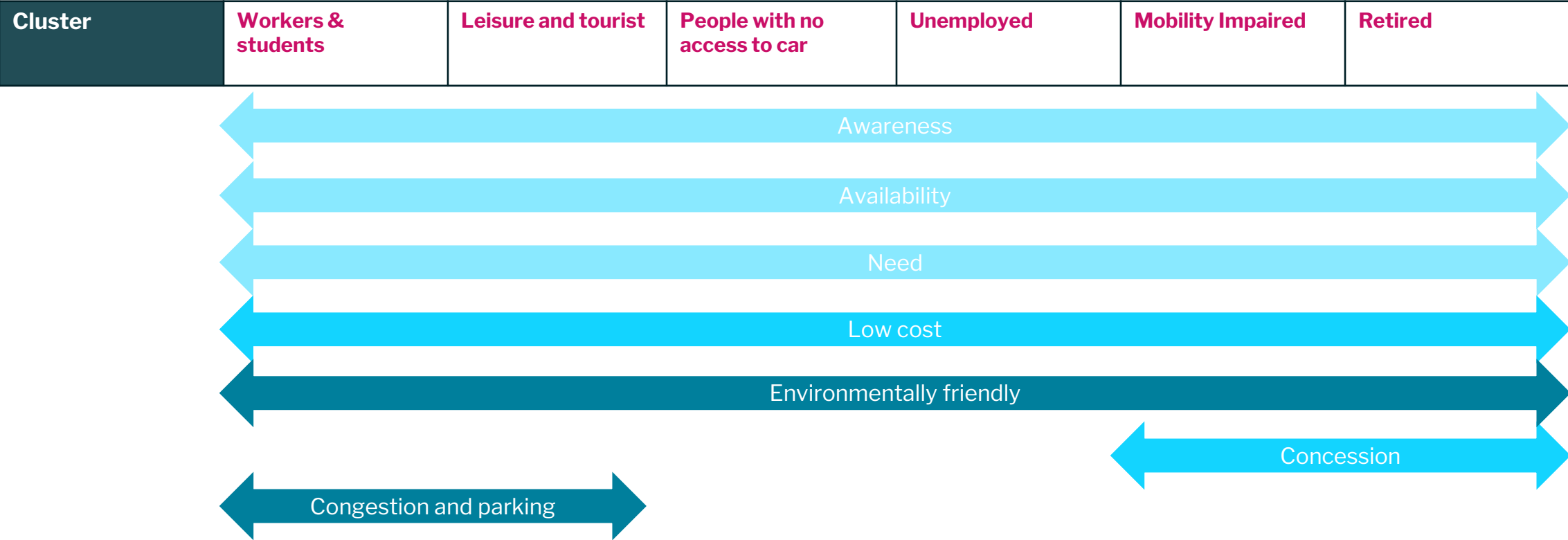
Ranking and importance of individual triggers and barriers depends on the individual and the type of journey they need to make

6 key groups of users/potential users have emerged

Cluster	Workers & students	Retired	People with no access to car	Unemployed	Mobility Impaired	Tourists
Who they are	<ul style="list-style-type: none"> Regular travellers Late teens – working age Generally lower SEG except students (more mixed) and some higher SEG in Sevenoaks (London commuters) 	<ul style="list-style-type: none"> Mixed gender Mixed social SEG 	<ul style="list-style-type: none"> Lower SEG Working age but may not be in work or working part-time and with childcare responsibilities 	<ul style="list-style-type: none"> Any but particularly lower SEG 	<ul style="list-style-type: none"> Any – range of ages and conditions 	<ul style="list-style-type: none"> Any
Why they ride	<ul style="list-style-type: none"> To get to work or university Students will also use for leisure purposes, commuters in this sample typically have other options at weekends 	<ul style="list-style-type: none"> For leisure purposes Short distance shopping trips and GP visits Visiting family/friends May have surrendered car so only option 	<ul style="list-style-type: none"> Shopping trips Leisure Visits to family and friends 	<ul style="list-style-type: none"> Leisure Travel to job centre and interviews Shopping trips 	<ul style="list-style-type: none"> Freedom/independence Commuting Attending appointments Shopping May not be able to drive themselves Can travel with carer 	<ul style="list-style-type: none"> Leisure purposes Don't know the area May not have brought their car Want to relax (no stress of driving) One way travel – walk out or back

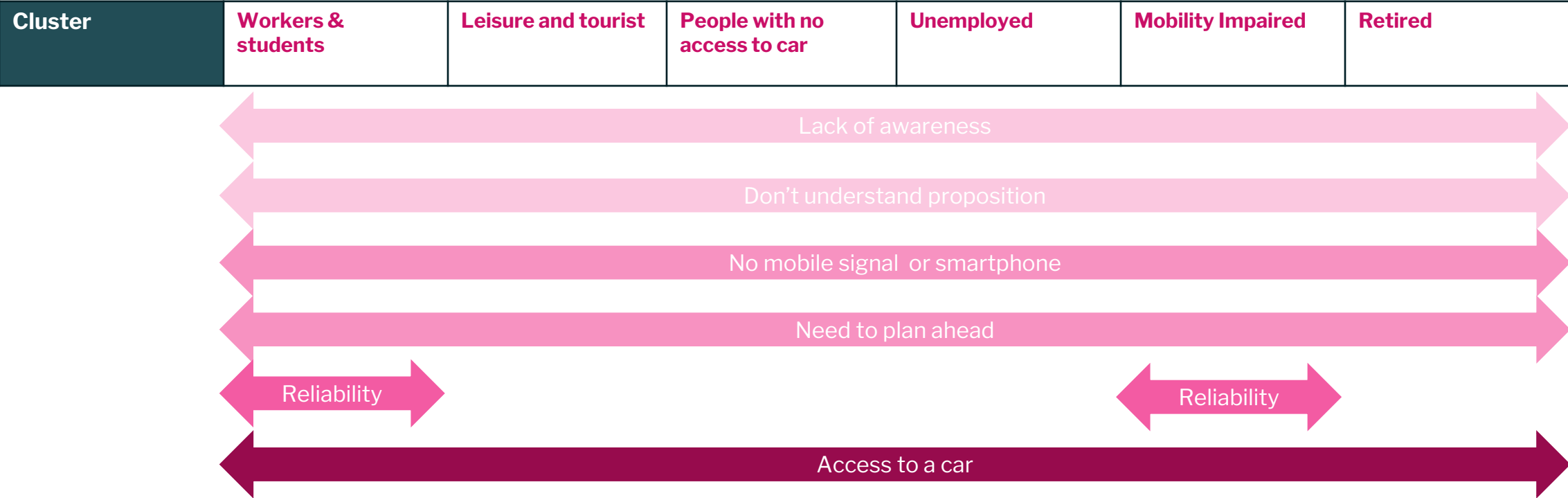
There are commonalities between the groups but also nuances which mean that messaging needed to encourage take-up are slightly different – especially in terms of overcoming some of the barriers to use of or increased use of fflecsi

Triggers to using fflecsi by group



Most triggers are common across the groups. Concession use is important to those entitled, congestion for workers and students on deadlines, and parking for both workers/students and leisure travellers who don't know an area well

Barriers to using fflecsi by group



Most barriers are shared across user types, which suggests that they could be answered by the same communications activity, with extra reassurance for those travelling on a deadline

Triggers: practical factors that encourage use are having the service close by and knowing about it

Awareness

- Need to know that the service is available
- Typically found out in fflecsi areas from conversations with drivers before the service started
- In all areas visibility of branded vehicles has raised awareness (though typically with limited understanding of the proposition)

The bus driver told me about fflecsi when It started last year - during the first lockdown In March or April. [Female Pair, Current Users, 29 & 27, E, Denbigh]

Accessibility

- Need to have a pick up point close to them – typically within 2-5 minutes walk
- Equally importantly, needs to be able to take them where they want to go

The fflecsi bus pulls up right outside my house - I couldn't ask for better. The Arriva bus was a 10 minute walk to the bus stop. [Female, Current User, 41, D, Denbigh]

Need

- Journeys that could be completed via a flexible service

My mum saw a sign I think when she was just driving around and when I got this job we were looking at how I could get there cause where I work there isn't a direct route to it, I'd have to get multiple things to work....so I just started using that and I've used it ever since. [Male, User, 18, D, Tees Valley]

The key need is to make people aware that there is a service that can benefit them – at the moment respondents believe growth is largely by word of mouth rather than through marketing, which suggests that there is a much larger pool of users waiting to be tapped.

Triggers: financial considerations are important for most who are choosing to use or considering

Low cost

- Pricing in all areas seen as a compelling reason to choose a flexible service
- Typically competing against scheduled buses and taxis, but for commuters will also compete against private cars on cost of parking and fuel

Being a pensioner, you've got to be quite careful with your pennies. [Male, User, 73, C1, Mobility Issue, Sevenoaks]

Concessions

- For those in receipt of them, concessions are a trigger to try public transport in general, including flexible services
- Some evidence across areas of car owners in possession of concessions using them to try out the service

It's great to get me out of the house to have a bit of sanity, I've got no worries about them not turning up, and my bus pass was really one of the things that made me try it. [Male, User, 61, E, Mobility Issue, Pembrokeshire]

Users are very happy with the pricing of their services, while potential users were generally shocked by the low cost when they saw it – this increases consideration of DRT/IRT when deciding on transport options for a journey

Triggers: wider environmental considerations are important, but vary by the individual

Environmentally friendly

- Some willingness to engage with the idea that DRT/IRT services are better for the environment and might prove an alternative to private cars for some journeys

I thought it's probably a greener option... it's probably very useful for people who don't have cars. It's probably better than using a normal bus. [Male, Potential User, 30, B, Tees Valley]

Congestion and parking – less car use

- Those travelling into towns or more urban areas value the ability to make use of bus lanes and not have to concentrate on driving while sitting in jams
- Clear benefits of a flexible service in terms of not having to look for parking spaces in town centres or at bust tourist spots
- Being able to drink alcohol on social outings without worry
- Use by tourists on holiday when they may not have their car or want to drive in an unfamiliar area

I might use it to go out for a couple of drinks at night so I don't have to drive home. [Male, Current User, 53, B, Sevenoaks]

Most have some concern for the environment, and particularly in Denbigh, Tees Valley and Sevenoaks younger people tended to think public transport is something they would like to use more of to reduce emissions. However environmental considerations tended to sit lower down behind timings, availability and cost. For current commuters there are clear benefits to DRT/IRT if they can be convinced of the reliability



***“I tend to use fflecsi almost
as a personal taxi service... to
town and back and forth.”***

Male, User, 32, C2, Denbigh

Barriers: awareness and understanding are the single biggest factors to non-use

Lack of awareness

- Launching during a pandemic has meant that with reduced promotional activity many people remain unaware of both the existence of the service and the proposition itself

Because I haven't heard about it. Also where would I get the app from? The app store, the internet? I'm not very good with that kind of thing! [Mixed Pair, Potential Users, 39, C2/D, Denbigh]

Don't understand the proposition

- Those that have some awareness of the services (in all areas) but have not used them are likely to:
 - Not understand how it works (because no pressing need to investigate)
 - Doubt the flexibility is genuine (because it seems too good to be true)
 - Typically do not expect a service to be coming to extremely rural areas, and don't expect that there will be an app – expect functionality to be 'clunky' or purely phone based for bookings
- Additionally, those who have seen the vehicles (below retirement age) have an expectation that this is some form of dial-a-ride service for the elderly or disabled, so don't look further as don't see the relevance

I don't know where it came from – someone was talking about it but I couldn't get my head around how it would work. I don't remember much more than that but they were confused so I was confused. [Male, Potential User, 65, C1, Pembrokeshire]

Because I'd only ever heard about it from disabled people I thought it might be for disabled people and the elderly – was I going to be allowed on? Was it normal? [Female, User, 18, E, Pembrokeshire]

Many potential users simply didn't know enough about it to have tried their local DRT/IRT service. However, there is also a presentational issue where a lot of the cues suggest that this is a service for the elderly or those with mobility needs – leading some to think it's a great service but also that they're not eligible to use it. Little stigma was observed, but it is nevertheless a barrier

Barriers: lack of awareness is then followed by perceived lack of access and complexity

No mobile signal or smartphone

- Those with poor reception (mobile or broadband) in the home or their local areas – real or perceived - are reluctant to experiment with flexible travel
 - Key fear is being stuck out of the home with no way of getting a return (aside from an expensive taxi)
 - Additional worry for some is not having reception at the pick-up point – so unable to receive updates about their service

4G is non-existent in some areas around here – I'm pretty sure they're still using candles in some areas. [Male Pair, Potential Users, 21 & 22, C1/2, Conwy Valley]

Need to plan ahead

- Some (particularly but not exclusively elderly) prefer the predictability of a scheduled service
 - While some are using flexible services, they would rather have their old service back
 - Others have decided it is too complicated and found alternative transport options
- Don't want to have to engage with booking either their outward or return journeys

It's fine for the younger generation - you can go on your phone, and it tells you when the bus will be with you. The older generation don't have smart phones. My nain - she'd have no idea, and you can't book it for her the day before. [Female, Current User, 41, D, Denbigh]

Those without access to technology are more reluctant to think about the advantages of a flexible service – prefer to stick to what they know and need help to overcome their fears about planning being time consuming, or being left stranded

Barriers: where relevant, access to a car is a strong disincentive to choose any other transport

Access to a car

- Additional cost of using a flexible bus services versus the sunk cost of car purchase, insurance, fuel and tax
- For some journeys, where things need to be carried (e.g. shopping) the car will be more convenient

*If it had the reliability and I knew I could get back I'd use it a lot more – it literally drops off in Darlington outside my office. But I'm not confident to use it knowing that I've got to get in for a meeting and then back home for a specific time. If you're on a tight timescale, allowing an hour for a fifteen-minute journey is no good so I think back to my car...
[Female, User, 40, C2, Tees Valley]*

Car owners can be persuaded to try DRT/IRT services where it makes sense to do so – on grounds of cost, wanting to drink, trouble parking – but there are powerful factors in car ownership that will continue to make the car the default choice for a lot of journeys. DRT/IRT is likely to make some people change to the bus for some journeys, but unlikely to prompt a mass shift away from private car use by itself.

Barriers: and trust regarding reliability is key for commuters – need to build their confidence in the service

Concerns about 'reliability'

- Relative strong concern about predictability of both *availability* (when I need it) and *length of journey* (to manage other aspects of planning and journey needs)
- Particularly acute for those who could use the services for their work
- Unwilling to risk trying the service for something important where they have to be somewhere on time (or plan to arrive an hour in advance to be safe – in the same way as may previously have taken an earlier bus than the one that arrives at the time they needed)
- The pandemic has also reduced opportunities to use for leisure, so they have not built up confidence in the reliability of the service – so it becomes self-reinforcing
- Where people have started using the services their initial trips have typically been by trial and error, and they would have liked step by step leaflets or examples on the app
- Real worries for potential users around what happens if there's too much demand/what if they're fully booked/are there enough buses?

For work, because it's weddings I just have to be on time, there's so much liability. I can't be stressed I have to be there at 8 o'clock in the morning. I wouldn't want to be stressed. [Female, Potential User, 41, C1, Conwy Valley]

The key worry for those in employment is whether they would get to work on time – followed by ability to get home if their finishing time changes
They need to see some communication of how the algorithm works to reassure them that they won't have their journey disrupted by unexpected pick-ups

Some tension between users who had never had a service before versus those who had lost a scheduled service to bring it in

Had a previous scheduled service

- ✓ Like the flexibility of the service
- ? Unsure how it fits alongside other scheduled services – which makes the scheduled services easier to predict/understand
- ✗ More likely to feel the loss where DRT/IRT has replaced a scheduled service
 - Will use the service, but think/talk about it in the terms that something has been lost
 - Not being able to return at fixed times
 - Having to ‘stand around’ in town centres

*Yr unig beth yw gyda'r fflecsi bod eisiau bwcio a mae'n nwisanse, ond gyda'r Llew Jones i Ddinbych, mae e jyst yn cyrraedd yma 10.15am pop dydd Gwener, a dyna fo! [Female User, 88, C2, Conwy Valley]**


'The only thing is with the fflecsi is that you have to book and it's a nuisance, and with the Llew Jones to Denbigh, it just turns up here every Friday at 10.15, and that's it!'

Did not have a previous scheduled service

- ✓ Grateful to now have another option to travel
- ✓ Much more likely to be positive about the service – very few saying 'it's better than nothing' and most generally enthusiastic
- ✓ Frame any criticisms in terms of builds for the future ('more buses', etc) rather than things they think have been lost/taken from them

I think that it's the best I can expect, I've got to make a phone call each week but that's alright. [Female, User, C1, 77, Pembrokeshire]

While the majority were positive about the flexible services, enthusiasm was greatest amongst those for whom this represented access to public transport for the first time/many years since last scheduled service



“It’s quite a hard concept to get round because we’re so used to bus timetables – this is more of a cross between a bus and a taxi.”

Female, Potential User, 58, B, Sevenoaks

Four groups appear likely to be quicker wins in terms of attracting on to DRT/IRT services

Leisure travel/the Retired

- Fewer barriers of time
- Less worried frame of mind overall – so willing to accept delay/not in a rush
- Tourists can see the value, but need to have visibility of the service

My wife and I are keen walkers, and the walks have to be circular. So I could see something like this would mean we could do more linear walks. [Male, Potential User, 61, B, Sevenoaks]

The less able

- Key advantages of being able to get closer to their address and their destination
- Cheaper than alternative transport (taxi)
- Set up to cater for wheelchairs and mobility issues (after assessment)

Is it going to be door to door, because if so then that's great for grocery shopping and carrying bags - especially if you've got a disability. [Mixed Pair, Potential Users, 54 & 49, C1/E, Conwy Valley]

The unemployed

- Similar to leisure and retired clusters overall
- Do have concerns around appointments they need to attend at specific times (e.g. job interviews) but more likely to have fewer alternatives open to them

My brother has to use it to go to job interviews, and so do I now I've finished college – it's the only option we've got. [Female, User, 18, E, Pembrokeshire]

The proposition appears to meet the needs of many in these groups as it currently stands, suggesting that the problem is lack of awareness rather than outright refusal to try the service.

While two are harder because less flexible in their plans

Workers and students

- Need to be persuaded of the reliability of the service
- Unwilling to test it out on a work journey and haven't had the opportunity of taking many leisure ones – may come on board with time

I didn't understand whether other people hailing the bus would delay my journey or not initially. Would that make my journey three times longer? I understand how it worked when I was on the bus, but it would have been nice to have some information beforehand.
[Male, Current User, 53, B, Sevenoaks]

Need much more reassurance on reliability – all think the bus will turn up, but the concern is more when it will turn up
Students potentially easier to influence than workers because they may still be learning to drive or not have access to a car

To encourage greater use by the six groups ...

Cluster	Workers & students	Leisure and tourist	Retired	People with no access to car	Unemployed	Less able
Communications needs/ interventions	<ul style="list-style-type: none"> • Service hours that accommodate commuting • Clear communication of how to ensure arrival by a certain time (and that this is an option) • Publication of percentage arriving by that time • Online reviews from other users • Vouchers for a free trial trip – to encourage experimentation outside commuting hours 	<ul style="list-style-type: none"> • Free vouchers for trial runs • Clear targeting via leaflets tourist information and attractions • Show clearly how flexible the service is – make website map fully interactive 	<ul style="list-style-type: none"> • Greater communication of the service 	<ul style="list-style-type: none"> • Greater communication of the service 	<ul style="list-style-type: none"> • Communication around using the service to get to job centres • Service hours that will accommodate using for work travel • Reassurance on punctuality 	<ul style="list-style-type: none"> • Messaging in local groups • Reassurance on accessibility of vehicles • Potential to talk up the home assessment as a benefit to give confidence on both sides rather than a barrier to be crossed to access the service?

To encourage greater use by car owners ...

Talk up the advantages of flexible bus services

- Less time spent in traffic jams
- No need to worry about parking or parking charges
- Better for the environment
- Can relax and let someone else worry about the driving (less stressful)
- Can drink alcohol without worry

Car owners are harder to convert to DRT/IRT, but over the course of the research sessions all could think of times when it might make sense to take the bus – if the other boxes for their broader group can be addressed

Current gaps in understanding of the proposition can leave people wondering if the service is right for them

Unsure what the service is being provided for

- Working people can feel that this service has been targeted at the retired or unemployed – especially in **Denbigh** where the hours of operation start at 0900 and finish at 1800; there are people that would use it more if it fitted in with their work patterns better
- **Conwy Valley** (0700-1900) feels more inclusive of everyone
- Where they don't run (or run a more limited service) at weekends this cuts out those wanting to travel for leisure purposes

Is it a different company to the other buses? What's the reason for doing it? That's what I'd be asking. [Male, Potential User, 59, C1, Denbigh]

Frustrations currently exist around the days and times of operation (where these are more limited) and then knowing whether a bus is really unavailable

All would like to see more buses in their area if it reduces how far in advance they would need to book

When understood, flexible services are seen as suitable for most users, but respondents were clear on three potential areas where they had more doubts

School transport

- All thought that in remote areas flexible bus services can provide a valuable service to isolated school children
- However, most felt that ideally school children should be on segregated services (because of noise, numbers, etc.)
- Additionally **in Denbigh** some resentment that the flexible hours of operation have to fit in around the schools contract

I'm not sure I'd want to use if it was full of school kids! [Mixed Pair, Potential Users, 39, C2/D, Denbigh]

Not a 'night bus'

- While many (especially younger) would like the services to operate later into the evening, no respondent thought it would be appropriate to run so late that the buses were operating a taxi service for drunks or people who might be antisocial

For me with the flexible service it would be handy to only have to run one way. [Male, Potential User, 65, C1, Pembrokeshire]

Some raised question marks over tourists

- In general most thought that flexible bus services could provide a good option for tourists – especially those wanting to walk one way and come back on the bus (or vice versa)
- However, respondents in **Pembrokeshire** and **Conwy Valley** questioned how many buses were in use and whether therefore this might affect how long local had to wait to get a ride

Only thing is, if it gets busier then does it get less flexible? [Male Pair, Potential Users, 21 & 22, C1/2, Conwy Valley]

The heartland for respondents is in discretionary travel, and as a lifeline for the more remote or isolated
There are no groups that they think couldn't use the service, its more about the groups that they wouldn't want to travel with



***“This is too good to be true,
this is Pembrokeshire, we
don’t get transport like this.”***

Mixed Pair, Potential Users, 39 & 41, B/D, Pembrokeshire

Trust is low in public transport across the regions, but some suggestion that flexible services can start to change that

Public transport in general has low trust

- Lack of confidence in service buses to turn up on time, and have seats available
- Trains more trusted than buses, except in the **Conwy Valley** where there have been recent closures due to flooding

The negative feedback about the buses round here from my children always put me off using them myself – I'd never have thought of jumping on a bus from here to go anywhere. [Female, Potential User, 58, B, Sevenoaks]

fflecsi has the potential to be more trusted

- Requirement to book leads to more confidence that the bus will come
- Guarantee of getting a seat

To be honest it's better because you know it's going to be there on time. It's only been late once for me and that's because they got lost because their satnav took them to the wrong place. [Female, User, 18, E, Pembrokeshire]

But needs to deliver as well as it suggests it will online

- Users tend to trust flexible bus services to come when they have been booked (though still a question mark over journey times)
- Potential users like what they have seen, but would want to try it out before being confident that it isn't an over promise

There's always the thing with buses that you're a bit uncertain whether they'll come or if you'll get a seat, but this gives you more confidence once you've got it booked. [Male, User, 32, C2, Denbigh]

DRT/IRT services have the potential to be more trusted than other public transport options if people can be persuaded to try them

Experience and perceptions of the service in detail – creation of awareness and promotion of the service

The limited promotion of the service in Wales as a result of Covid has fed through to limited awareness

There is clear interest in the service when it is understood

- None in the sample felt that a flexible bus service would be of no help to them but they didn't grasp initially what it was or how it would work
- All could think of occasions where they would use the service, and many of the current users could use it more than they currently do too

I'm looking forward to the time I see so many faces that I don't always see I'd love to be travelling again – fflecsi's going to be more into play then. [Male Pair, Potential Users, 21 & 22, C1/2, Conwy Valley]

Almost all current users would like to see it extended in their area

- Would like to make more journeys themselves
- Want the opportunity extended to more people (currently unserved)
- Small number of exceptions who want their scheduled service back

I think It's brilliant - so much better than before. It needs more advertising. I've got everybody using It - all my family and friends! [Female, Current User, 41, D, Denbigh]

But potential users are not seeing it advertised currently

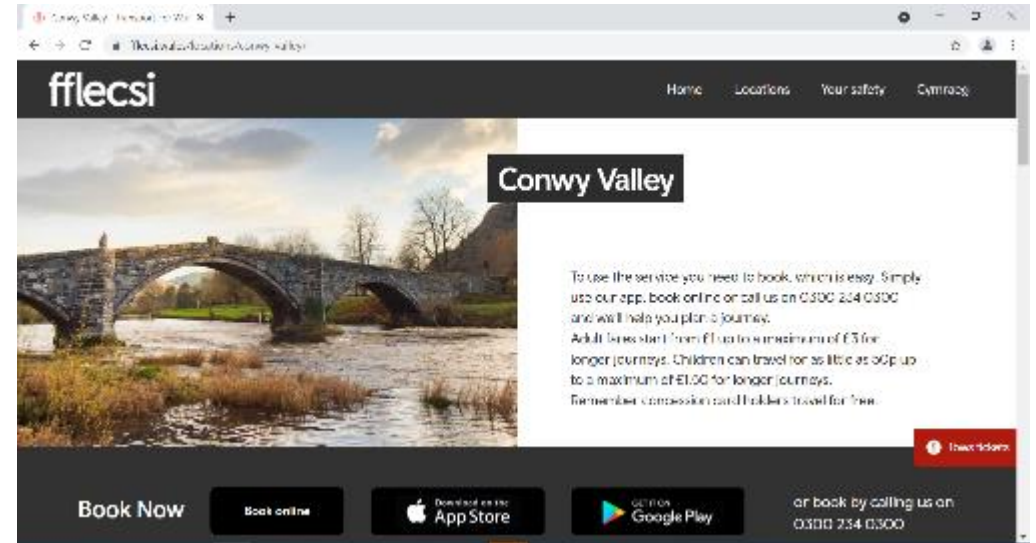
- The research process was helpful in explaining to potential users what the service is, how they can access it, and to allow them to begin to think about how they might use it
- However, none thought they would have been likely to do that research themselves unprompted

Considering I work for the hospital usually we're told of these other services, but we've heard nothing about this. [Female, Potential User, 29, C1, Pembrokeshire]

DRT/IRT services are valued, and most think that they are part of the future. However, potential users simply hadn't been seeing or hearing about the services with sufficient detail to create understanding because of the limited promotion possible as a result of the pandemic

fflecsi website is generally clear but there is room for improvement

- ✓ Sets out hours of operation
- ✓ Easy to navigate
- ✓ Clear on the area and hours /days of operation
- ✓ Signposts how to book
- ✓ Relatively clear on price – gives a good idea of ballpark figures, which are surprisingly low
- ? FAQs comprehensive but a long way down the screen – frequently missed by phone browsers
- ? Map shows service area well, but potential users would like it to be interactive so that they can zoom in and see pick up points without having to take the next step and download the app
- ✗ Some current users felt that the look and feel doesn't reflect the character of the service – feels a bit too dark
- ✗ Tone not as welcoming to people as it could be – can come across as cold/corporate
- ✗ Lacks a clear statement of who the service is for and exactly how it works (how flexible it is)



When I saw the website I thought it was well set out, easy to access, good overall. Easy to book, contactless payments make it safer, aims to get you as close to home as possible, child friendly. It's good because round here there are people who need this to get out rather than using it because they want to. [Female, Potential User, 29, C1, Pembrokeshire]

And the pages for individual areas are welcomed, with room for some improvement



- Clear on pricing examples
- Operating hours make sense – younger respondents would prefer later running and some disappointment about lack of Sunday service
- Not clear in March/April about why services to Corwen only run on certain days - confusing

It would definitely be good if it ran later, and why can you only go to Corwen sometimes? [Mixed Pair, Potential Users, 40-55, C1/E, Conwy Valley]



- Clear service hours – although User respondents believed there was also a lunch break 1200-1300 when the bus is unavailable
- Not set up for commuting with 0900 start, disappointing for those wanting to link in with other services
- Clearest statement on flexibility 'not just at a bus stop'

From a selfish point of view, maybe an earlier start and a later finish so I can use it for work. [Male, User, 32, C2, Denbigh]



- Clear on prices and connectivity with other services
- Confusion with St Brides services how they can offer guaranteed arrival times on some services without multiple buses, or how a fixed route can work flexibly, because they don't understand the proposition fully – though the integration of Bwcabus (post fieldwork) may help with more options

If it was pre-booked then shouldn't it be arranged to suit you – it's not clear? [Female, Potential User, 29, C1, Pembrokeshire]

For respondents in Pembrokeshire, the guide and video produced by the operator (Pembrokeshire Voluntary Transport) are reassuring

- ✓ Explains how the service works
- ✓ Walks through the process of booking
- ✓ Video makes clear that there will be text updates
- ✓ Boosts confidence in Potential Users that this is a proposition that they will be able to get to grips with and use without difficulty

? But still confusing about the semi-scheduled routes/days

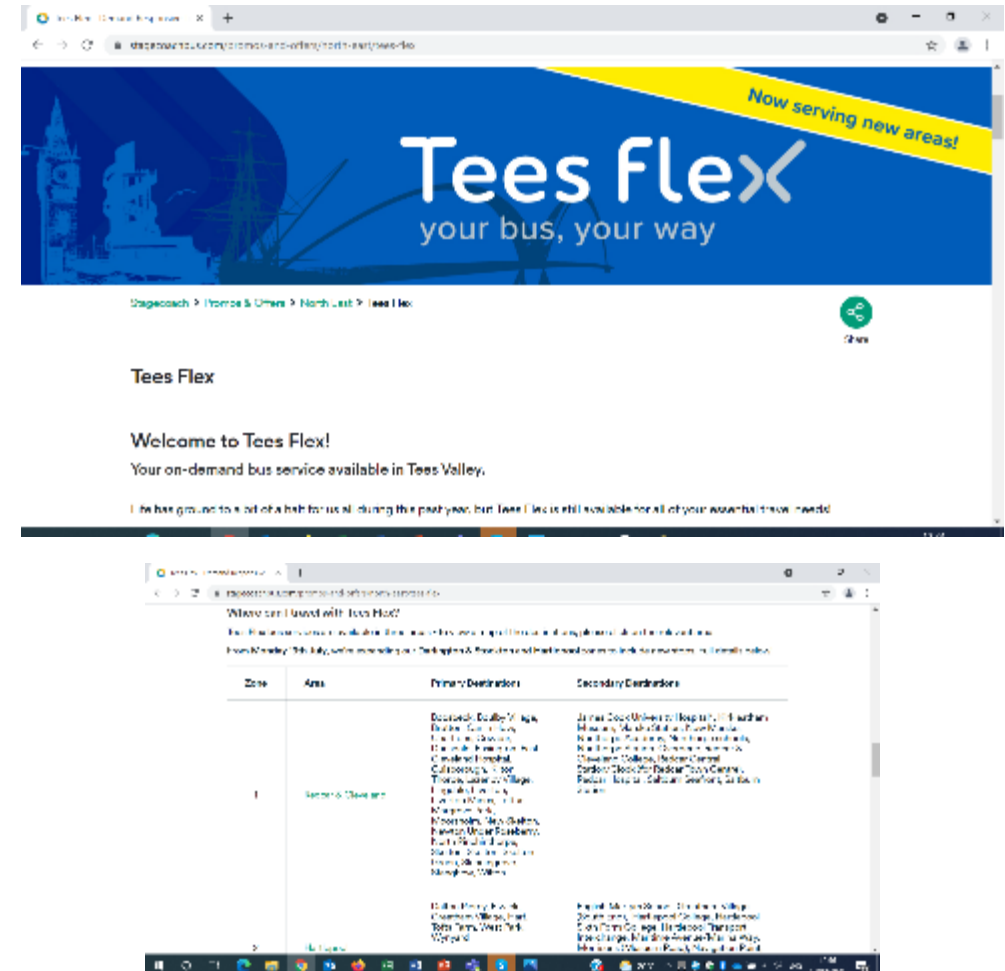


It's more descriptive when it says where the service starts and finishes – but it's confusing... is there more than one bus? With the times it makes it look like it's just one trip – over that many hours! [Female, Potential User, 29, C1, Pembrokeshire]

Tees Flex website overall makes sense, and provides more information on the proposition than fflecsi

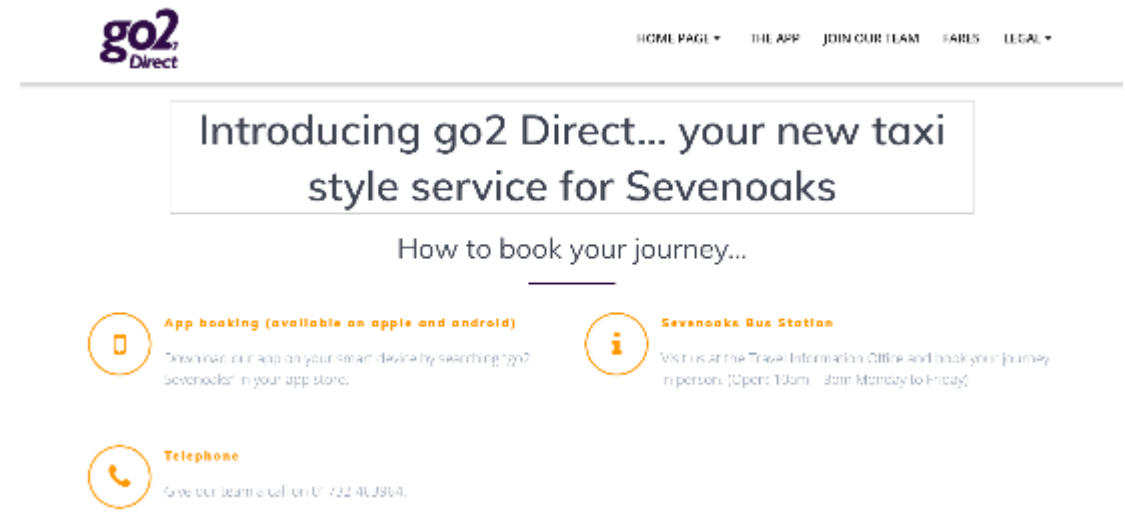
- ✓ Clear explanation of the service
- ✓ Clear on who it's aimed at and how it works 'first come first served' – which means overall fewer questions on the proposition from potential users
- ? Much less clear on the coverage by location
 - ? List of destinations feels exhaustive, but also difficult to navigate at a glance
 - ? Less clear on the difference between a primary and secondary destination
- ? Pricing methodology clear, but respondents found it difficult to visualise distances between places they travelled to, so were unclear on what the cost would actually be for them
- ? Some perception that the app makes it hard to book return journeys when there's already an outward booking in the system – leading to some users leaving their return booking until after they've arrived at their destination, and potentially having to wait a long time for a pick up

The website explains it pretty well, but until you actually use it.... When you look at the map, and it's covering such a large area you start to question if it really works. I picked up more once I was using the app, because it's easier that way to see where the stops are. Online there's just a list of places. [Female, User, 40, C2, Tees Valley]



Sevenoaks website is seen as usable, but doesn't explain the offering to potential users

- ✓ Overall layout of tabs is seen as logical
- ✓ Clearly explains what to do and how to make a booking
- ? Less clear on how the proposition works – comments from potential users that it's assuming people will know roughly what the service is by the time they arrive at the site
- ? Not always clear which service they're talking about (Go2 or Go2 Direct) or what the difference is beyond size of vehicle
- ? 'Interactive map' isn't interactive, and difficult to interpret where the service area extends to – raises question around whether they will go just over the border if needed?
- ? Colour contrast with all the blues makes it difficult for some to read- particularly when looking at overlaid Sunday and Bank Holiday service area versus Monday-Saturday



Then they talk about the 'interactive map' – well it's not is it? It's just a picture. I understand that it would probably be on the app but if they're trying to explain to me how it all works and why I should use the app then can't they have a better map on their website than the one they've got? There's not enough contrast between the two shades of blue they've used for the area. [Male, Potential User, 61, B, Sevenoaks]

Desired improvements from users: assistance with how to use the service

How to guides to enhance understanding

- Step by step online guides (with video) on how the service works and how to:
 - Use the app
 - Use the service
 - Integrate with other modes of transport on the journey
 - Ensure that you get somewhere by a certain time
 - Work out how much time to give the journey at different times of day
 - Work out how far to book in advance on different occasions
- Interactive maps
- Better explanation of the proposition

I think it would be helpful to have a little video of somebody using the service...just to explain to people how it will work the first time. It'd make it less dry. Might make it easier for older people. [Male, Current User, 53, B, Sevenoaks]

They could put something on YouTube showing someone booking it on their app and the steps you have to go through. Video is much better for this sort of thing. [Male, Potential User, 65, C1, Pembrokeshire]

Make the website more user friendly

- Most are looking at the website before they download the app or make a call so:
 - Tone needs to be warm and inviting
 - Interactive maps would be useful to understand exactly where they can and can't go

Very few thought that they wouldn't be able to use the app with some help, but the process so far has been trial and error – potentially more people would book online or on the app with greater training aids

Desired improvements from users: more promotion when Covid allows

More promotion of the service to raise awareness

- Genuine worry from some users that the buses are running lightly loaded because of limited knowledge of their existence
- They like and value their service and are keen for more people to use it so that it doesn't get taken away
- Potential users claim to be likely to give flexible bus services a try when they have understood the proposition fully (after taking part in the research)

It needs to be advertised more because although I knew it existed I didn't know anything about it really. There are a lot of people around here who would use this if they knew about it, the older people, the more isolated.
[Male, Potential User, 65, C1, Pembrokeshire]

Most current users are keen to talk about why they value the service, and conversations with potential users suggest a level of latent demand once the benefits and proposition have been communicated

Experience and perceptions of the service – planning and booking

Ability to plan and book in advance welcomed by most potential users, though some worry about this reducing spontaneity depending on how far in advance they need to book

Creates certainly that there will be a service

- Helps workers, the less confident and the elderly who know when they're going to want to travel
- Typically no change in booking method according to journey purpose
- Would welcome inclusion of scheduled services as solutions via the app – where available – to be sure they're making the right decision for the time they want to travel
 - In the remoter areas of Wales the expectation is that fflecsi will be the only option but where there is an IRT service it will work

This new service I think is bridging the gap that you don't get totally frustrated by standing around at the stop for an hour and then going home again. The fact that you've booked it means you know it's going to come – that's a really good thing. [Female, Potential User, 58, B, Sevenoaks]

If you can book it a week in advance to me that would be more like booking a taxi, I'd like to be able to do it on the day as well though and see what all the options are with the normal services. [Male Pair, Potential Users, 21 & 22, C1/2, Conwy Valley]

But this can be at the expense of spontaneity

- Key worry for potential users is whether they can still wake up on a nice day and decide to go somewhere on the spur of the moment
- Equally workers with clearly defined shifts can see the benefits of advance booking, but if they have to stay late or work on a different site then that raises questions for them in terms of what they would do

But there's no set timetable so you don't really know how it would work, can you do it at short notice. Today the weather forecast is for rain but it's a glorious day... [Male, Potential User, 65, C1, Pembrokeshire]

Advanced booking options provide certainty but also create a need for reassurance on how far in advance rides need to be booked to be sure of getting one

For users, length of time booking ahead depends on circumstance

Fixed or important appointments can be several days or weeks ahead

- When they know that they need to travel, the general pattern is to book several days ahead in order to be sure of getting a seat, and also the time that they want to travel
- Over time, users getting more adept at booking 'arrive by' times rather than 'leave by' to ensure they are at their destination in advance
- Certainty is valued over exact timings, with user respondents noting that they can spend over an hour waiting for an onward connection, or before their appointment having arrived early to be sure of getting there on time

I've got an appointment calendar with them all booked in well in advance.
[Female, User, C1, 77, Pembrokeshire]

Lead times are reduced for other journeys

- The most isolated respondents are booking a day ahead for shopping or leisure trips to be sure that they can travel when they want to
- In **Denbigh** and in the **Tees Valley** there were more incidences of same day booking cited, though this can be frustrating when a bus is required and there are none available (leading to last minute searches for e.g. lifts from neighbours)

Wythnos 'ma, nes I trio bwcio'r bws fflecsi ar gyfer 10 or gloch, ond fe ddwedon nhw bydde'r bws yn dod am 9.15 or gloch, felly roedd angen i mi fod lan a mas yn gynnar, a wedyn on ni yn Llanrwst cyn 10 or gloch. Nid oedd y bws yn mynd nol wedyn am 4 awr, felly oedd e'n amswr hir i aros o gwmpas. Nid oedd hyn yn 'ideal', oherwydd o ni ddim am bod na cyhyd.
[Female User, 81, C1, Conwy Valley]

'This week I tried to book the fflecsi bus for 10am, but they said it would be coming at 9.15am, so I had to be up and out early and was then in Llanrwst before 10am. The bus wasn't going back then for 4 hours, so it was a long time to wait around. It wasn't ideal, as I didn't want to be there that long.'

Users have come up with regimes that work for their needs,

Preferred booking methods generally determined by comfort with the technology, but some resist more screen time than they already have to have in their life

App generally praised

- Many across areas did not expect such a highly local service to have an app – so for users who have downloaded it is both intuitive and impressive
- Value option of being able to set ‘arrive by’ time (though question whether it will work in practice on a busy service)
- Map and text alerts of approach boost confidence and perceptions of trust/reliability
 - Some people struggle to identify their nearest pick up point on the map – which means when they’re notified of where it is it can be a surprise


When it logs you in and finds out where you are – you confirm your location so you’d assume that’s where the pick-up point is. It’s only when you confirm the booking that you get told it isn’t. [Female, User, 40, C2, Tees Valley]

But still resisted by some

- Most respondents have felt that they had to use the app, so have taken the plunge’ with no regrets
- Others feel that this is beyond them, so want to use the phone – either have experimented and given up or lack the skills/technology/signal to experiment
- Small number of younger service users who want to use the phone because of the amount of screen time they have in their working day – would rather deal with someone over the phone (something that we have seen more of over the pandemic across projects)

I’d want to book over the phone because it’s good to hear confirmation from someone else’s voice. I always have that thing in mind that I might have got it wrong, or made a mistake. If someone tells you then it’s their word, reassurance, and if it goes wrong it’s their fault. [Male Pair, Potential Users, 21 & 22, C1/2, Conwy Valley]

Most are using the app, and likely that app usage will increase over time. Booking through the website is a clear third choice after app and phone, and generally only considered by app users in this sample if their smartphone is out of action

The image shows the interior of a wheelchair-accessible vehicle. A ramp is extended from the side door, which is open. The interior has wood-grain paneling on the walls and floor. A wheelchair is positioned on the ramp. Safety features include handrails, a fire extinguisher, and a wheelchair symbol on the wall. A green exit sign and a red circular warning light are visible on the side panel. The text is overlaid on the left side of the image.

“Dwi’n gwybod bod rhai pobl yn defnyddio’r app, a mae nhw’n dwud bod hyn yn ffordd hawdd i fwcio, ond nid oes gen i ffon symudol.”

Female User, 81, C1, Conwy Valley

I know some people who use the app, and they say this is easy to use to book, but I don't have a mobile phone. [Female User, 81, C1, Conwy Valley]

The call centre still has an important role to play

Call centre is relied on by some

- Used by those without the app, or app users when they want to discuss a complicated booking or to query something/complain
- Some app users used the call centre for their first booking because they wanted to be talked through the process
- Believe that the staff are professional and friendly, but less easy to build rapport with them than the local drivers - though some elderly users feel they have built a good relationship with individuals that they really value
- Missed where not available or can't get through – people can feel like they're being forced to use the app

The call centre would be ok for information on start and finishing times and if you've got any other questions. [Male, Potential User, 65, C1, Pembrokeshire]

Some tension over lack of local knowledge

- fflecsi call centre operators are pan-area, meaning that there can be confusion when a booker says 'in the village' and they don't know which village
- Some feeling from the recurrent bookers that the call centre operators should know who they are after a year (because they ring in so regularly – potential to make better integrated use of a database?)
- Staff turnover means there can be frustration when there's a new call handler who doesn't know the individual ringing in and what they will want to do
- Frustration at the fflecsi call centre with the number of questions handlers ask

The call centre is alright, but they don't know the area. At Home Bargains you can't cut through, and they don't know that you can't easily walk to it. [Female Pair, Current Users, 29 & 27, E, Denbigh]

The call centre provides a valuable service to those without smartphones, and to troubleshoot problems for all

Value for money is a key consideration when booking – though there are occasions when it can be overridden by immediacy/availability

Versus other methods

- Clear sense that it does provide value for money versus other transport options if it can be relied upon to arrive and depart on time and if it doesn't have to be booked multiple days in advance to be sure of getting a seat
- Issue of dynamic pricing at peak times in **Sevenoaks** was understood, but this did make using Go2 at those times unaffordable for some travellers

What if you really needed to use it, but it was already all booked up? [Mixed Pair, Potential Users, 39, C2/D, Denbigh]

Lack of guarantee of immediacy

- The key area where a flexible bus service can fall down in perception of value is if it is needed in a hurry unexpectedly – question marks over whether it's available to be with you at the drop of a hat
- Sense that status would be checked, but that taxis or timetabled services (if available) might represent better value in this circumstance

Obviously, you can download the app to make bookings. The thing is though that you can't just go and wait at the stop, you have to make a booking. Imagine someone needing to get out of something and you can't flag it down... [Female, Potential User, 29, C1, Pembrokeshire]

DRT/IRT is definitely better than nothing for people who previously didn't have a service, but concerns can be raised for some if needed very quickly

Attitudes to ticketing depend on the individual, though all can see the value in having some proof of purchase

Multiple payment options is the ideal

- Resistance to going cash free – some respondents want to use cash themselves but more thought that withdrawal of cash would discriminate against the elderly
- In general, happy to be able to make card payments on the bus
- In-app payment has become so mainstream that it is a surprise to some that they can't pay on the app – and they would value the option

A receipt or a ticket is a waste of paper, it's going to be of no use to me – if you're on holiday then it might be a souvenir of your holiday but not living locally. [Male, Potential User, 65, C1, Pembrokeshire]

Most happy to not have a ticket

- Seen by many as a waste of paper – and if on the bus then the driver knows they've booked otherwise they wouldn't be there
- But do want to have some way (even if just on their phone) of proving the booking if they need to

I'm not bothered about having a ticket for just a one-off journey. I think if you're going to use it regularly then maybe it would be good to have something, either an actual ticket or on your phone. [Male, User, 32, C2, Denbigh]

But still desired by some

- Used as a receipt for accounting (or work expenses)

Through ticketing is very interesting to passengers

- Strong desire to be able to buy one ticket to cover both the bus journey and an onward bus or train journey – greater expectation that for this there would need to be a ticket

That would be a good idea – it might be a saving if you do the two together. It's just better than booking on two different websites when you can just do it all on one. [Female, Potential User, 29, C1, Pembrokeshire]

Ticketing is more important when journeys are longer or involve connections, but increasingly people are happy to have tickets online rather than as a physical piece of paper

Integration with rail and scheduled bus/coach services is desired where possible

Integration is desired where relevant

- Strong desire for integration from commuters in the **Tees Valley**, and in **Sevenoaks**
- Others would also value this across the fflecsi areas, though most did not expect to need integration on a day-to-day basis – but it gives more options

I'd want it to connect with other buses and trains for business purposes. [Female, Potential User, 58, B, Sevenoaks]

Would help them to think they could rely on it

- Integration with key train or bus times would help passengers who needed to travel onwards, but would also be a cue of reliability for those with more doubts about whether they could use flexible buses for more than leisure travel

Where I have used it sometimes in the day is if I'm finishing early then you can call it up and it's there waiting for you when you get into town, but it would be better if there was more chance of doing that all the time, then I might use it more often for getting to and from work. [Male, User, 32, C2, Denbigh]

But integration needs to be handled carefully

- The flexible concept (when understood) sets expectations that services are genuinely available on demand – and IRT adds an additional layer of complexity that some struggle to understand
- Most see DRT as an enhanced offering (especially where they previously had no service at all)
 - Variations of service hours by day, or (as) in **Pembrokeshire** certain services operating only between two points on one morning, add levels of complexity which make users and potential users switch off

It's the different routes on different days though – what if you want to go to the same places every day. If you've got a 9-5 job in Fishguard and you need to get there from here then they're not going to be able to use this are they? [Female, Potential User, 29, C1, Pembrokeshire]

Strong desire for integration across the areas, and particularly from those living in **Denbigh** who work in Prestatyn and would like to be able to use fflecsi as part of their commute – but currently can't because of the hours of operation and lack of 'joining up' with the coast buses. But while such integration is desirable, for some this can detract from the 'flexible' proposition, so needs to be carefully communicated

Desired improvements for the booking process

Enhance the ability to book for other people and make this more obvious

- At present some doubts that bookings can be made for other people - to facilitate group travel and allow for more excluded people to use
- Also some desire to be able to book on to a bus as it goes past (via the driver)
- Investigate discount codes for family and friends

If you could book more In advance, then a relative or carer could book It for an elderly person. Older people don't like change and they don't like to call.
[Female, Current User, 41, D, Denbigh]

Consider provision of booking points in common destinations

- Town centre and supermarket locations for either touch screens or fixed phone lines to the call centre
- Facilitate more spontaneous usage to overcome reluctance to plan, or to allow those without smartphones (or phones) to make bookings to get them home when they are ready rather than having to plan ahead

I think they'd have to have some way of letting people without phones book from in town – like a phone in the supermarket or something. [Male, Potential User, 59, C1, Denbigh]

Maintenance and promotion of the call centre

- Valued by less IT literate users
- Some previous phone bookers have made the switch to the app, but are concerned that older friends and relatives don't have smartphones or aren't comfortable using the internet

I worry about the app... Not forgetting the older people in the area who most likely don't know how to use an app... It's a bit of a mis-match with the local population. The call centre is essential.
[Male, Current User, 57, C1, Tees Valley]

Ideally make booking for self and others as straightforward as possible, and reduce worries about ability to make the return booking when already out and about

Experience and perceptions of the service – the journey

Buses themselves are quite surprising when seen for the first time

- Most had the expectation that they would be smaller than a normal service bus (because of the need to navigate narrow roads) but the minibus nature does cue community transport (which raises questions for potential users about eligibility)
- However, users value the newness of the vehicles and believe that they are comfortable, well-signed, and with good mobility access
- Some query over how practical it will be to carry multiple users at busy times, but the pandemic restrictions over the first half of 2021 – overlapping with the fieldwork – meant that this had not so far been an issue for any user respondents
- Charging points are appreciated – query whether WiFi can be fitted in the future?

It looks like a nicer bus than the normal buses. [Mixed Pair, Potential Users, 39, C2/D, Denbigh]



The drivers are a key feature of the service across locations

Know their areas and their customers

- Local knowledge makes a difference as it means that drivers can use common sense as well as the algorithm to work out routes
- Common comment that new drivers are obvious because that's when the bus is late

You know when it's a new driver because they're late – they don't know where to go. [Female, User, 46, E, Mobility Issue, Pembrokeshire]

Develop rapport with their regular customers

- Happy to chat – especially valued on otherwise empty services as means that there are no awkward silences
- Know an individual's needs
- Will 'go the extra mile' for people – reduces concerns about return journeys because passengers know that their driver knows to expect them

Very good, very good, accountable, lots of good conversation with the driver I always sit as close to the driver as possible. [Female, User, C1, 77, Pembrokeshire]

Not like 'normal' bus drivers

- Users think that the DRT/IRT drivers they have encountered have been more cheerful than scheduled drivers
- Can sometimes feel like an inconvenience on scheduled services (especially wheelchair users) but the scale of this sort of operation makes them feel less like they're a burden

The drivers have got to know the local area so that they can use their initiative, not get lost, drop people off in better places, not knock on to the times so there aren't as many delays. [Male Pair, Potential Users, 21 & 22, C1/2, Conwy Valley]

Drivers are extremely important to how the service is perceived by users, and a good first experience converted several people in the sample into regular users, who had only used it as a trial previously

The logistics of pick up are a key concern for both current and potential users

Size of time windows and hours of operation

- The window in which the bus might arrive to pick up can feel too wide to reliably know when they will reach their destination
- Service hours lead to questions around how well work and other trips can be coordinated

You've got 10 minutes notice, which is just long enough for me to get there on a good day. [Female, User, 40, C2, Tees Valley]

Lack of notice

- Some complained that they don't have enough notice of arrival – especially where they have to leave somewhere with mobile signal to get to the spot – can heighten anxiety
- There are also worries when they do leave the house that they have to race to the pick up point to avoid missing the bus (and having to rebook)

I wanted to try Tees Flex because the way it was described was that the pick-up point would be reasonably close. I live in a row of 10 houses, then there's half a mile, then a golf club. The bus comes past the door so I assumed there would be a stop at the end of the street. I booked it and then got the message saying the pick-up point is at the golf club – so I had to walk half a mile down a narrow 60 mile an hour road with no verge to get to it. [Female, User, 40, C2, Tees Valley]

Pick up placement is not always appropriate

- All think that the operators have placed pick ups according to where they are likely to have most demand
- However, this does lead to anomalies such as in the **Tees Valley** where there's a pick up point at the entrance to a golf club, but not for the houses nearby - whose residents therefore have to walk down an unlit road with no footpath to be picked up and dropped off when the bus typically drives past their houses to get there

For the older, less able, and those with poor mobile reception there is a request for greater notice of when the bus will arrive

Timings and capacity post pandemic are an increasing worry for both current and potential users as rider numbers rise

Doubling back in particular adds time to journeys

- None in the sample had typically been travelling regularly on full buses
- Has grown a sense of the bus as their personal transport
- Frustrating when the driver receives another booking en route and they have to double back

Do you have to stay on if they're picking up other people and then you find yourself going in the wrong direction to pick them up – I don't want to be going away from where I'm trying to get to because I could probably walk it in the same time. [Male, Potential User, 59, C1, Denbigh]

Journeys becoming too long

- Appetite to use flexible services over longer distances but practical concerns over how many other people might be picked up en route – so turning a 30 minute journey into over an hour
- Some evidence from tourist areas of **Pembrokeshire** of locals reducing their fflecsi usage into the summer as worries about timings and capacity have increased with user numbers

I don't use the fflecsi bus on Mondays anymore...when I first started using them it was new in the area and I was on my own on the bus and it always came at 9.30 so I always got to my voluntary shift on time...But as it got more popular I wasn't able to get the right time so now I drive for that journey because I need to know I'll get there on time. [Female, User, C1, 77, Pembrokeshire]

Number of buses

- Belief that fflecsi is either expensive or has been introduced to save money so there can't be many buses – leading to early booking to be sure of getting a seat, and worries that time between booking and pick up will only increase as the service becomes more popular
- This can lead to appointments being missed because no service is available – where a scheduled bus wouldn't have had that issue

To date, the doubling back issue has been more frequently experienced than journeys being lengthened by a large number of pick ups – but this makes users concerned about what the service might be like as / if it grows in popularity and usage. Communication around service levels and future plans desired to reassure/address these points.

Routes overall seem logical, though potential users don't all grasp the flexibility

Generally make sense

- Most felt that the routes their services used were appropriate, though there was a belief that when the service launched the algorithm could send buses on lengthy detours where drivers would know a short cut
- Potential users (because they've not experienced an actual journey) more likely to struggle with the idea that there isn't a fixed route for services

Really, it's straightforward, I was impressed that they greet you by name, on the way back the driver did drop me by my house because I asked him – they're not supposed to. [Female, User, 40, C2, Tees Valley]

Driver flexibility/initiative is appreciated

- Common praise for drivers ignoring marked pick up points to save having to walk further – especially where they would be driving past the passenger's house anyway

If I've got something big, like I can take my bike...he will actually drop me as near to my house and he'll get out and help me. [Female, User, C1, 77, Pembrokeshire]

Potential users struggled to understand exactly how flexible the service is

- For potential users there is a belief that the drivers might have to use their initiative – but their expectation is not door to door service, most thought that they would have to go to a pick up point
 - Even with the smaller vehicles, potential users have an expectation (set by scheduled buses) that these services will stick to the main roads
 - Those that have grasped the proposition see the flexibility as genuinely differentiating and exciting

I'd want them to pick me up from the bus stop, don't expect it to come to the house, I wouldn't expect it to go through the estates. [Male, Potential User, 59, C1, Denbigh]

At the time of research, relatively light loadings meant that concern about routing was more hypothetical than based on experience. However, there is a hope that the algorithm will be able to resolve things fairly when there are more passengers travelling

Zones of operation are approved of overall, but there are questions around where the lines have been drawn

Make sense in most areas

- The compact service in **Denbigh** is valued for providing a transport solution within the town and connecting Henllan to Denbigh
- Similarly in **Conwy Valley** and **Sevenoaks**, the area covered fit is with where people want to travel

Makes sense for us because it's just the valley isn't it – from Llanrwst down to Corwen. [Male Pair, Potential Users, 21 & 22, C1/2, Conwy Valley]

Lack of coverage in Middlesbrough is questioned

- **Tees Flex** passengers and potential users don't easily recognise that the service is linked to the Tees Combined Authority, and question why there is restricted coverage within Middlesbrough or into North Yorkshire and County Durham – especially for people living near the borders of the Tees Valley

Bizarrely for this area Middlesbrough is missing and that's where a lot of people are going to want to go. It's almost as if they're saying 'that's good enough there so we're not going to cover it.' [Male, Potential User, 57, C1, Tees Valley]

Pembrokeshire zones are not ideal

- Some feeling that the zones are 'lines on a map' that don't take into account how people naturally travel (or to where)
- Strong demand to be able to more easily cross zones to get to e.g. Haverfordwest or Milford Haven to access services – potentially addressed to some degree by Bwcabus integration post fieldwork

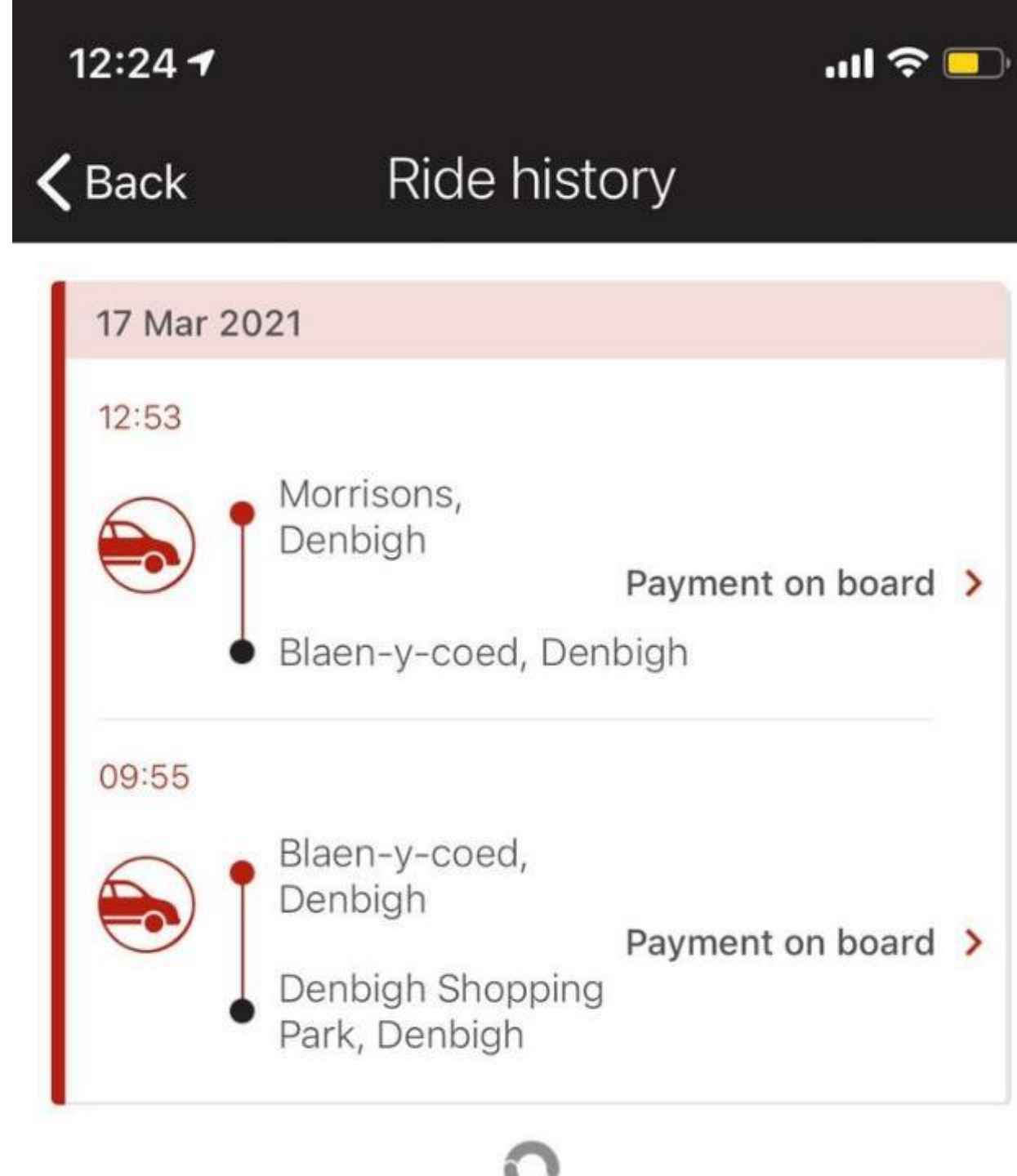
I feel like the zones are really small though. My brother needed to go to the Job Centre in Milford Haven and he can't do that. He's got to go into Haverfordwest, when Milford Haven's not that far away. [Female, User, 18, E, Pembrokeshire]

Reflective of needing more understanding of where people want to travel to, there is some frustration from those living by service borders about the options they have to travel with DRT/IRT services

Some feeling that flexible bus services could replace other buses over short distances

- DRT/IRT services have a clear perceived benefit in providing on demand transport in rural areas
- To that extent both users and potential users feel they could become the first choice transport preference
- However, there are downsides to this
 - Most thought that when a bus became too busy it would need to get bigger, and that would push back towards a 'normal' bus service
 - The general feeling is the model works well for journeys of up to 20-30 minutes – any further than that and more buses would be needed to avoid other people having a delayed pick-up because the vehicles would be in the wrong place
- Ideally they would sit alongside scheduled services rather than replacing them – otherwise can come across as a cut to services

Clear feeling that flexible bus services are a short range proposition for less busy routes



Desired improvements: primarily focused on service times and zones

Earlier start and later finish times , narrower windows and more notice

Ideally, areas would look at cross-border travel and other extensions, and more thought to ensure pick up points are as logical as possible

- To enhance ability of working people to use – 0700-1900/2000 seen as appropriate core hours
- Request from younger/more socially active respondents to look at running until 2100 to allow for meals out or after work drinks
- Demand for more notice of when vehicles will arrive, and the time windows to be more accurate

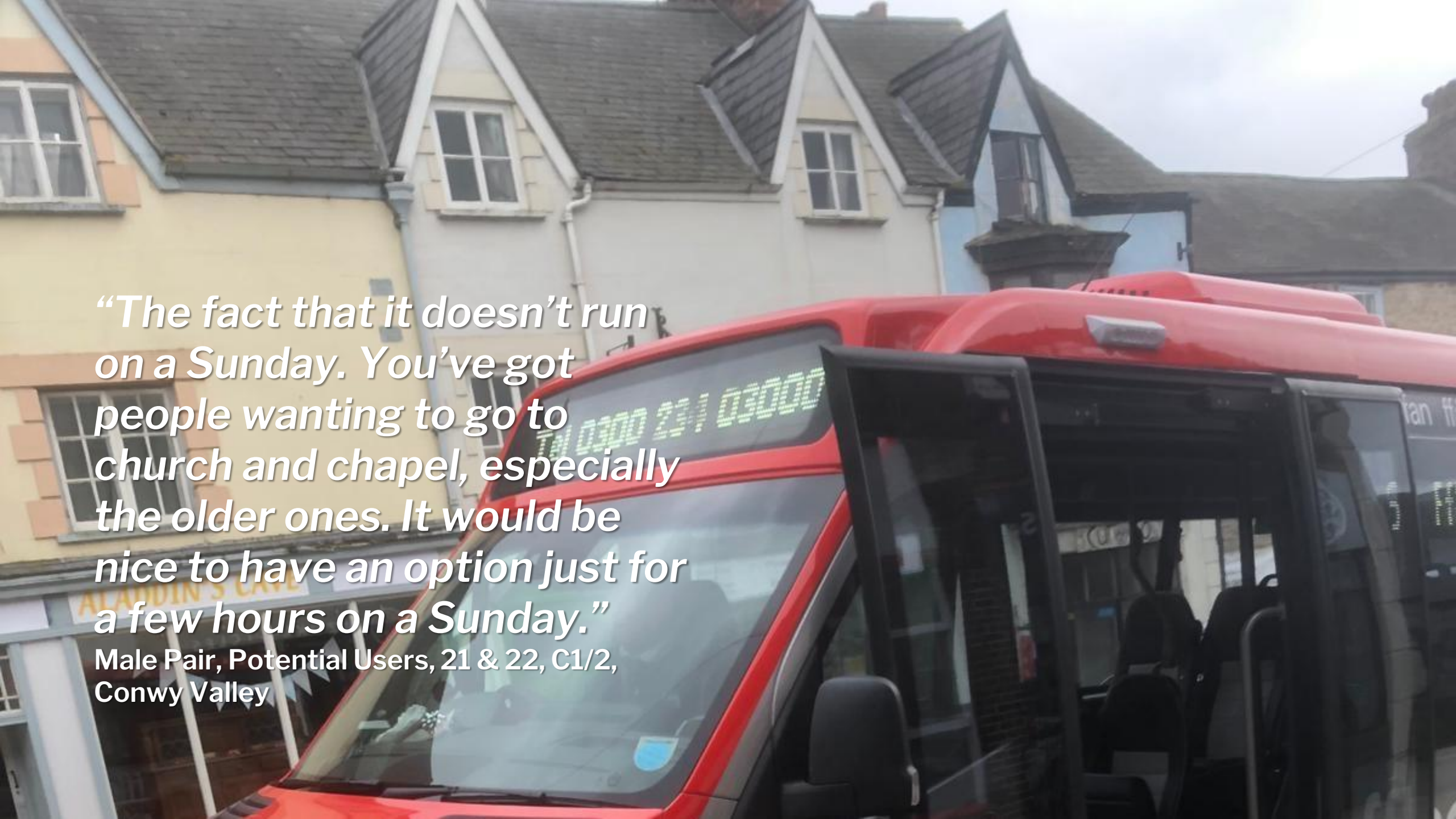
- In all areas, ensure pick up points are located where people are
- Work in **Pembrokeshire** to understand north-south traffic flows and make it easier to travel between zones
- In the **Tees Valley**, explain the difference between primary and secondary destinations
 - Make it easier to travel between zones
 - Collaborate with Middlesbrough authorities to extend the services into Middlesbrough – at the moment users don't really understand why there's a hole in the middle of the operating area, especially where that's where they would like to travel to
- Some demand in **Denbigh** to extend northwards towards the coast
- Overall approval of the current operating areas in **Sevenoaks** and the **Conwy Valley**

It's not for me at the moment – maybe if they did it in the evenings. [Male, Potential User, 59, C1, Denbigh]

I guess it would be helpful if you could get out to those coastal towns. They're close by, but at the moment you'd need a train or two buses to get there on time. [Female, Potential User, 42, C1, Denbigh]

I wish it wasn't so rigid, the drivers are not allowed to go off piste, I wish they could. It's quite strict and I see why, it's just frustrating that the boundaries are so set in stone... They always say 'no sorry, it's out of zone.' [Male, Current User, 57, C1, Tees Valley]

Commuters think they would be more likely to use where the service hours tie in with their work hours. In general there is satisfaction with the services based on smaller geographical areas – with the larger areas, especially where zonal, there is some desire for making them more user friendly in terms of ability to cross internal boundaries, or link in with services on the external boundaries



“The fact that it doesn’t run on a Sunday. You’ve got people wanting to go to church and chapel, especially the older ones. It would be nice to have an option just for a few hours on a Sunday.”

Male Pair, Potential Users, 21 & 22, C1/2, Conwy Valley

Conclusions to date

Strong similarities across the five areas studied to date

Services are very alike in terms of who uses them and how they use them

- In each service area, similar types of people are travelling for similar reasons, and have similar perceptions of the strengths and weaknesses of the service they use
- The only recognisable differences from the public perspective are hours of operation and the existence (or not) of internal zones
 - With the exception of Go2's new smaller vehicle service which launched in the middle of the research period (May 2021)

There is also a high degree of alignment in the views of stakeholders

- Stakeholders and operators have been looking into DRT/IRT for similar reasons – to widen access and service provision, and look for better use of budgets
 - Across areas widening access is seen as the primary driver, and there is some feeling that if done properly, a DRT/IRT service will not save money
- No fflexcsi area studied was likely to have gone ahead without TfW's support – similarly in England the role of local authorities has been crucial in backing flexible bus services, with the mandate from the **Tees Valley** mayor particularly important in funding/promoting Tees Flex
- All flexible bus services examined rely on strong partnership between the relevant stakeholders: flexible bus services can provide efficiencies but, overall, the feeling is that there needs to be a will from both local government and operator to make them part of the transport mix in an area

Across all areas there is a lack of awareness from potential users about what these services are, and who they are for

- Uptake of the service is likely to increase as awareness of the service increases
- However, there can be negative perceptions that this is an exclusive service for the elderly, or a lack of understanding of the proposition as a whole
- As a result it is crucial to articulate the proposition in a way that shows it is inclusive, responsive, and available to all to give it the best possible chance of success

Findings suggest a sound case for flexible bus services from users and potential users

All users and potential users can see the advantages of flexible bus services and how these services might be able to help them

- There is interest in the core idea of flexibility, with current users largely valuing the ability to travel when they want to, rather than being beholden to a fixed timetable
- The flexible bus service offering is particularly valued by those who did not previously have a public transport service in their location, and those who have particular mobility needs
- Flexible bus services in the study areas are currently being used successfully for a variety of appointments, leisure travel and regular shopping trips
- In our sample a minority were using flexible bus services for work-related journeys, and doing so with some success – suggesting that there may be growth in this sector as awareness of the service increases and confidence in the reliability grows

There are currently perceptions of some weaker points in the service: reliability (predictability), timings and additional 'hassle'

- Where DRT has received less favourable feedback in the study to date is in relation to regular travel such as commuting
- Specifically, potential users have less certainty and confidence around the ability of flexible bus services to regularly get them to and from work, and have consequently been reluctant to try them for that
- Operating hours in **Denbigh** in particular are unsuited to those who would otherwise use fflexsi to travel to work, particularly those needing to travel onwards to Prestatyn and looking for a link from home to the bus station
- Older users who would prefer to be able to travel without having to plan ahead are also concerned about reliability and find this a deterrent to use
- Ultimately, most of the negatives/points for improvement stem from a lack of experience of the service – potential commuters not using it because they don't know if they can trust it, rather than because they know they can't – which should improve over time

There are points that can be emphasised to entice new users – but it's clear that DRT/IRT is not a silver bullet answer for transport provision in an area

Within the research, interest from potential users increased in response to some clear surprises about the service, indicating these can be leveraged in communications

However, flexible bus services remain unlikely to meet all public transport needs for users

There is a clear sense of where flexible bus services provide the most utility

Welcome surprises:

- **It's for everyone** – people can easily 'pigeonhole' flexible bus services as Dial-a-ride, expecting it to be aimed at mobility impaired users and the elderly, meaning some don't know if they'd be welcome or eligible to use the service
 - **Genuine flexibility** – there is some belief that services run along traditional routes, and limited appreciation that this is an expansion into new areas, and off main roads/away from traditional bus stops
 - **Competitive price** – offering a service near comparable to a taxi in terms of convenience but at bus prices
 - **Modern** – the buses are understood to be new, because they've been seen – but little awareness from potential users of the existence of the app which, when understood, feels up to date, surprising for rural areas, and builds confidence that this is a new type of service for a new century
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- Even the most enthusiastic users and stakeholders believe that there is a threshold beyond which scheduled traditional buses make more sense than flexible bus services – when so many people want to travel the answer is either a prohibitively large number of vehicles and drivers, or larger capacity buses, and so the flexibility starts to be lost
 - While the ideal for many passengers would be to use flexible bus services to go wherever they want to go, the need for the service to remain responsive to other bookers sets the boundaries for travel at about 30 minutes from the operational hub
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- **On routes in remote areas** – both in terms of demand, and to increase penetration off the main roads
 - **To feed remote settlements into transport hubs** – where users can change for onward journeys
 - **For connection between spokes** - cutting out the need to move spoke-hub-spoke and therefore streamlining journeys

