

## Welsh Government Consultation on Bws Cymru White Paper: One Network, One Timetable, One Ticket

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### Introduction

Transport Focus is the independent consumer watchdog promoting the interests of rail users throughout Great Britain; bus, coach and tram users across England, outside London; and users of the Strategic Road Network in England. Our subsidiary Transport Focus Wales was set up to give focus and energy to representing Welsh transport users. We have a Board Member for Wales, appointed by Welsh Ministers.

We welcome the opportunity to respond to this consultation. Our response is informed both by our extensive evidence base and insight gathered through the engagement of our work in Wales. This gives a strong case for setting out passenger priorities, barriers to address and actions for improvement, to support the potential that proposals have to improve the bus journey experience and satisfaction for bus passengers and to attract new users.

We set out below the evidence from a user perspective, before addressing consultation questions. Finally, points of key importance are summarised in Appendix 1 where we set out **10 actions to benefit and attract passengers**.

### Responding from a user perspective

From Transport Focus's perspective the key challenge is whether the proposals reflect the needs and priorities of both existing and potential passengers, with the added dimension of the current context. The closer that the specifications and targets support these and reflect people's changing needs, the better the chance that they will deliver the type of services that people want and value and will attract users to re-grow the market and build confidence towards travelling in future.

Transport Focus's research provides good understanding of people's changing expectations and aspirations towards transport, against which the proposal can be reviewed.

### Priorities for encouraging greater bus use

We researched views towards getting passengers back on buses in 2021<sup>1</sup>, engaging with people across Britain on their views and attitudes towards returning to public transport. In particular, ranking a series of improvements to encourage bus use in order of priority. As well as the rank order, the research also gives a sense of relative importance with an index of one factor compared to another. The table below shows the order of importance that

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<sup>1</sup> [The route ahead: Getting passengers back on buses](#). Transport Focus. June 2021

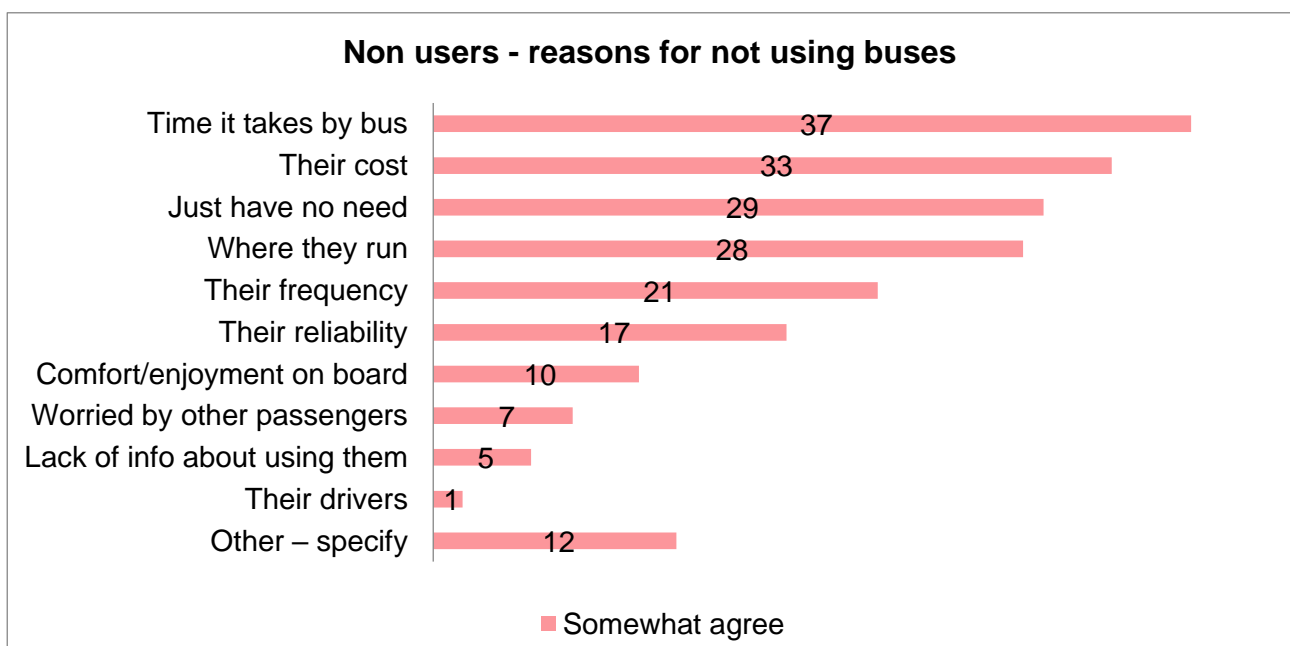
people in Wales gave to improvements that would encourage greater bus use (non covid specific), across Wales and also in urban compared with rural areas.

From this we can see that a continuing high standard of cleanliness has become a key need, followed by punctuality, reliability and frequency of service. In urban areas, better value for money and faster journey times have a higher level of importance, demonstrating a need for cheaper fares and measures to tackle congestion. In more rural areas, buses stopping closer to home and destination are of greater importance; also buses going to more places are a higher priority, highlighting that it is essential for the reach of the network to deliver the journeys and connections people want to make, to provide an attractive network that encourages modal shift.

Priorities for encouraging bus use in Wales	Wales index	Wales priority	Urban index	Urban priority	Rural index	Rural priority
The inside of the bus is maintained and cleaned to a high standard	160	1	124	1	158	1
Punctuality and reliability	118	2	114	2	119	2
Buses running more often than they do now	110	3	101	4	109	3
Being able to get a seat on the bus	100	4	106	3	99	4
Better value for money from bus journeys	70	5	90	5	65	6
Buses going to more places you want them to	68	6	65	7	68	5
Buses stop closer to home/destination	59	7	54	8	63	7
Faster journey times than they are currently	58	8	71	6	52	8
Free Wi-Fi more widely available	43	9	47	9	41	9

### Addressing barriers to travel

Our research shows repeatedly that key barriers to travel are cost, convenience and complexity. Unless services are affordable, attractive and easy to use, people will make other choices. Our recent work on priorities for improvement<sup>2</sup> asked non-users to give their top two reasons for not using buses. Results are in the table below.



<sup>2</sup> [Bus passengers' priorities for improvement](#), Transport Focus. September 2020

Looking at results in more detail, cost is the main issue for females and younger non-users, while for older non-users, it is about where the bus runs and frequency. ‘Other’ reasons ranged across a number of issues, including disability, mobility needs and anxiety. This last point was also highlighted in our research looking at the experiences and needs of young bus passengers<sup>3</sup>. Taken together with priorities for improvement, these issues set out the actions for creating an attractive bus network.

Physical access on buses has been improved a great deal by persons with reduced mobility (PRM) specifications, although aspects like ramps do need to be used, which is not always the case, highlighting the need for greater training. However improving on-board access is no good if access to the bus stop is limited, so there are numerous issues still to be addressed.

Inclusion has two strands. In terms of the reach of the network, the issues above show the importance of buses going to more places – so more people and destinations are covered by the network. However time of day is also a key need, which is illustrated by our work with Transport for Wales into experiences with the *fflecsi* bus service pilots. Feedback from Newport is that this has given them a service in the evenings and Sundays for the first time, causing people some embarrassment for somewhere the size of Newport – and if that is true for Newport, how much more so in other more rural areas? There is a real need to set out an attractive and effective network to provide for the journeys people want to make at the times they want to travel.

Value for money is key for people in Wales, and of higher importance for young people and those commuting in urban areas. Even before the current crisis, our Bus Passenger Survey<sup>4</sup> results for Wales show satisfaction with value for money at 64 per cent and for younger passengers at only 60 per cent. In our post-pandemic setting, lapsed users say special ticket offers and loyalty schemes would encourage them to use the bus more and they are likely to return to using the bus sooner if the first trip is at a reduced price, highlighting the real value of cost as an incentive.

### **Actions for improvement**

It is clear from our research that improving punctuality is a key priority for improvement. We know from our Bus Passenger Survey that passengers are consistently less satisfied with the punctuality of their buses than they are with bus services as a whole. The Bus Punctuality Project<sup>5</sup> enhanced our understanding of when, where and why buses are delayed, working alongside operators and local authorities. A number of case studies highlighted the challenges of setting timetables to reflect variable patterns of traffic and patronage, potential improvements to reliability and savings from managing buses in the cycle; and have shown up a number of recurrent themes as areas for action or support:

<sup>3</sup> [Using the bus: what young people think](#), Transport Focus. February 2018

<sup>4</sup> [Bus Passenger Survey 2017](#), Transport Focus. March 2018

<sup>5</sup> [What’s the hold-up? Exploring bus service punctuality](#), Transport Focus. December 2014

- Boarding and alighting – delays from numbers of passengers boarding suggesting buses with two sets of doors for separate entrance and exit may be more effective; some people need more time, such as elderly or parents with buggies and children
- Fares and tickets – complex fares options mean some passengers may need more help to understand the best ticket, especially if new or visiting; may not have money or smartcards ready; ticket machines can be complex for drivers
- Traffic and highway design – increasing traffic volume and road space constraints provide a constant challenge, narrow roads limit scope for bus lanes; poor junction design, signal phasing and lack of yellow boxes can hamper progress
- Parking and loading – obstructions caused by inconsiderate parking or high street deliveries needing effective enforcement; particular times of day such as school times, evenings and Sundays for take-aways, night clubs or recreation areas
- Exiting bus stops or stations – re-entering traffic flow from lay-bys needing improved geometry; measures addressing buses being blocked by traffic queues; planning road layouts and technical solutions at new bus station sites
- Inadequate recovery time – knock-on effects from driver changeovers, layover time, effective roadworks management with permit schemes and preferred diversions; protocols for managing accidents, impact from parallel routes and events.

Our rail research in Wales<sup>6</sup> shows satisfaction with connections with other transport at only 65 per cent. Together with the priorities above for travelling to more destinations indicates the need to improve links between transport modes in Wales and across the border, to help make public transport a more attractive option for those travelling for work, business and leisure and provide the reach of the network and journey opportunities that people want. Our research into transport integration in Scotland<sup>7</sup> examines the issue. Good transport integration offers seamless, convenient journeys with well-timed connections. A greater shift to more sustainable, integrated journeys will help to reduce emissions and congestion. Key points include considering those who are less experienced with travel or service or are making unfamiliar integrated journeys, the particular needs of cyclists and those travelling with luggage, and co-ordinated and timely communications between transport providers – the negative impacts have been highlighted in Wales by specific passenger experiences, such as those travelling to make ferry connections. A good practice example is TrawsCymru linking with train services using a single ticket, saving both time and money. Our research showed four key areas for attention which will enhance the experience of integrated travel for passengers and potential passengers:

- Information – to give passengers the tools to proactively plan their journeys, hold their hand when changing services and be smoother and less stressful overall
- Travel environment – to improve the comfort and security of integrated travel
- Infrastructure and service provision – to make integrated travel as accessible and tailored as possible around passengers' needs – such as buses accessing stations, facilities to carry and park cycles and safe walking routes

<sup>6</sup> [National Rail Passenger Survey spring 2020](#), Transport Focus. July 2020

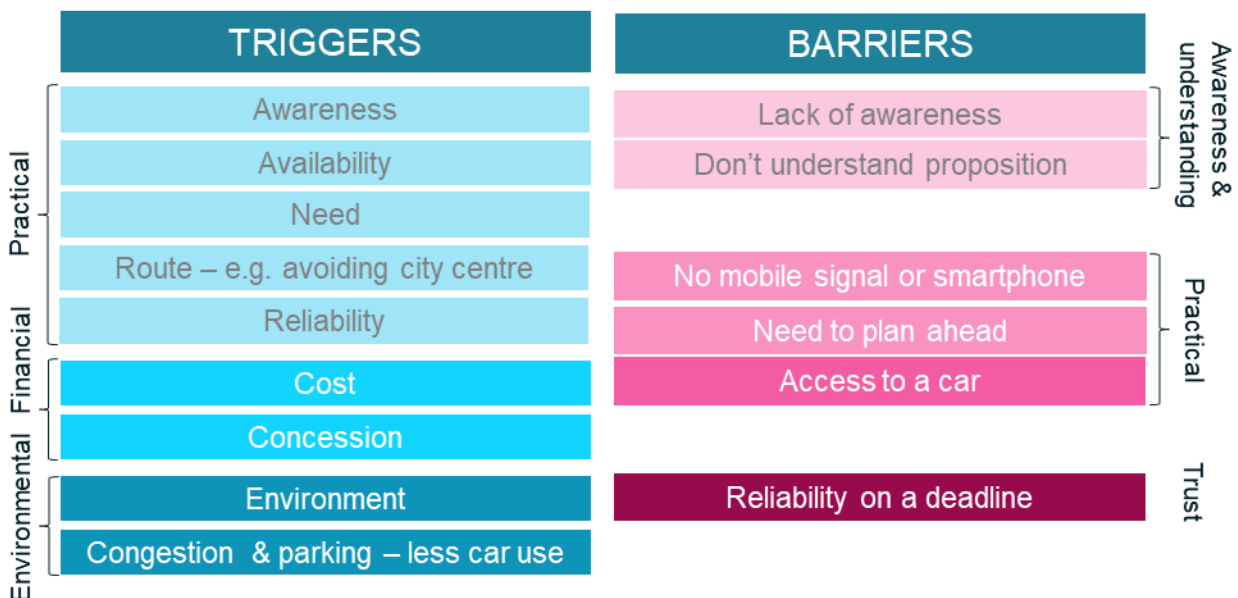
<sup>7</sup> [Transport Integration in Scotland](#), Transport Focus. 2014

- Ticketing, costs and fares – to simplify the purchasing process by putting in new technology to enhance convenience and to benefit passengers with potential cost-savings and greater flexibility of available transport and through-ticketing options.

### Opportunity for innovation

Bus reform gives a valuable opportunity to challenge bus service provision with new and innovative forms of service, but to be effective, they must form part of an integrated network. As mentioned above, we have worked with Transport for Wales to assess the experience of demand responsive and integrated responsive transport pilot schemes under the *fflecsi* brand in Wales and comparison with two schemes in England. Our interim report<sup>8</sup> was published earlier in 2022 and the final report will be out shortly.

Key findings show that once people understood the *fflecsi* offer, they generally saw it as innovative and a modern solution to local transport. Some of those who had been used to a scheduled, if limited, service before the introduction of *fflecsi* were disconcerted by the change. They preferred the simplicity and perceived reliability of the scheduled service. Others recognised that not only does *fflecsi* maintain a local bus service, its very flexibility provides a much enhanced offer. We noted a consistent set of triggers and barriers across localities (as detailed below). There are some nuances which mean that what might encourage take-up varies a little between the groups. Congestion and parking are more of a trigger for workers and students and for leisure and tourists, while eligibility for concessionary travel is naturally most relevant for the retired and mobility impaired. In terms of barriers, the one noticeable difference across the groups is that reliability is of greatest importance to workers and students and the mobility impaired.



Trust in public transport is low across the regions, but there is some suggestion that flexible services can start to change that. Main conclusions from the research show:

<sup>8</sup> [Fflecsi – the experience of Demand Responsive Transport in Wales](#), Transport Focus. February 2022

- Once the flexible concept is understood, it is seen as an attractive option both by previous bus users and by some who might be open to using it in place of a car
- Promotion and education are imperatives if people are to fully appreciate the concept, the ride booking system and the fact that it is ‘for everybody’
- Demand Responsive Transport is well-suited to serve rural communities where the economics of scheduled bus services may be marginal; and has a role to play in metropolitan areas such as Newport, providing buses in areas not served as well as enabling cross-city journeys that would otherwise need two scheduled services
- Shopping, attending appointments (medical, job interviews, etc) and leisure trips predominate; the current operating times in areas other than Newport may not accommodate conventional commuting hours or journeys to school or college
- Integration with existing scheduled bus and train services is appealing, but there are concerns about the reliability of connections and trusting the service to deliver
- For many, using an app to book is appealing and marks the service out as innovative and modern; while some prefer to use the call centre (which is a key part of the offer and a reassurance if people experience any difficulties with the system)
- The vehicles used are generally well-liked (including by the mobility-impaired), but it is the drivers who are the face of the service and who make the passenger experience what it is
- The successful introduction of a DRT service is dependent on a good working relationship between the partners (operators and local authorities); Transport for Wales’s role in enabling access to the software, back office and call centre has been critical in establishing the *fflecsi* operations
- However, if DRT schemes are successful in boosting passenger numbers post-pandemic, the economic argument may switch in favour of scheduled services (particularly where commuting is significant)
- **Primarily, the research points towards a valuable role for demand responsive transport as a part of overall the transport mix.**

## Responding to questions

### Question 1

Do you agree that change is required in how we deliver bus services to meet the needs of Wales’ citizens and respond to the climate emergency? Please score from 5 agree strongly to 1 disagree strongly. Please provide comments.

We agree something needs to change. Bus patronage in Wales is falling. Figures<sup>9</sup> show there were 91 million passenger journeys in the twelve months prior to the pandemic, which had fallen by more than 20 per cent on figures a decade earlier. The 2011 Census<sup>10</sup> showed that 23 per cent of people in Wales had no access to a car or van and many rely on buses for travel to work, appointments and to access leisure opportunities.

<sup>9</sup> [Quarterly bus statistics: October to December 2021](#), Department for Transport national statistics. 2022

<sup>10</sup> [Public service vehicles \(buses and taxis\) April 2020 to March 2021](#), Welsh Government. April 2022

We remain concerned about the shrinking of the bus network in Wales, particularly in rural areas and in the evening and at weekends. Since 2011 the number of buses and coaches in Wales has fallen by 25 per cent<sup>11</sup>, staffing has fallen by 15 per cent<sup>12</sup> and the number of bus companies running services has declined, leaving gaps in the network. Over the last few years, local authority transport budgets have come under significant pressure; councils have had to make tough choices about how best to protect the bus services they support and passengers have often been at the sharp end of those decisions.

If the Welsh Government is to deliver its Vision, meet its carbon reduction targets and other objectives there is a need for modal shift, with bus made relatively more attractive compared with non-sustainable modes.

## Question 2

**Do you agree that franchising is required to deliver the depth and pace of change to the bus network that is required in the context of the climate emergency? Please score from 5 agree strongly to 1 disagree strongly. Please provide comments.**

The main arguments in favour of franchising concern combining the innovation and entrepreneurship of the private sector with the ability of Government to integrate socially necessary services into a coordinated plan centrally. Profitable services can be used to cross-subsidise unprofitable but socially necessary services. Franchising also provides the best opportunity to make it easier and simpler to use buses through co-ordinated passenger information and streamlined ticketing.

However, there are concerns that although franchising may be more efficient, it can be expensive. Passengers will want to be confident that it will not result in increases in fares.

Covid-19 has had a significant impact on public transport. Figures produced by the Department for Transport<sup>13</sup> show that bus journeys in Wales in January 2021 were only one-third of levels pre-Covid and that even in October to December last year, they had only recovered to 50 per cent of normal.

There is a risk that demand may not recover to pre-Covid levels, with a mixture of increased working from home, modal shift to car or residual concerns about personal safety on public transport. The bus industry faces a potential drop in revenue that threatens the viability of services.

So we believe one of the 'tests' for the future model in Wales is how well it copes with a drop in revenue and its ability to maintain investment and subsidies. To this end it could be argued that the franchising model, with its wider resources and sources of funding, does offer a larger 'safety net' at such time and as a result offers more stability for passengers.

<sup>11</sup> [Number of bus and coach vehicles](#), Stats Wales. April 2022

<sup>12</sup> [Number of staff employed on buses and coaches](#), Stats Wales. April 2022

<sup>13</sup> See note 9

In saying this we are talking from a purely passenger perspective – we acknowledge that the risks from a taxpayer perspective are different.

The English example suggests legislation to facilitate franchising can place demands on local authorities which may discourage some from pursuing this option. The Bus Services Act 2017 only allows mayoral combined authorities in England to make franchising schemes and the legislation and supporting guidance place considerable requirements on them should they wish to do so. To date, only one authority has made such a scheme and this will only start to be implemented in September 2023. The opportunity to proceed by means of Quality Contracts Schemes has been even less successful.

However, it is not clear from the proposals how the legislation might be structured. If the Welsh Government wants to pursue franchising, it should be careful to keep the requirements in the legislation and any supporting guidance proportionate. We would like to see further details on this.

### Question 3

Do you agree with the Welsh Government's preferred franchising model as described above? Please score from 5 agree strongly to 1 disagree strongly. Please provide comments.

The ideal model should provide bus services that are consistent, achieve a high standard of service and are easy to understand. This requires a level of country-wide and regional oversight, while allowing for local input to reflect local needs and challenges. Granular passenger research and local consultation also needs to be built into the model.

Trust will need to be rebuilt as part of the measures to attract people back to public transport. A key factor will be in having a network that provides services and connections for the journeys people want to make. However the 2017 Bus Passenger Survey<sup>14</sup> shows satisfaction with public transport connections in Wales at 70 per cent. People will need to be assured of the security of funding to support connectivity and give confidence in the ability to make journeys and return again later in the day, particularly at evenings and weekends and in support of a return to the retail and leisure economies.

### Question 4

Do you agree that this model provides sufficient local input for designing local bus networks? Please score from 5 agree strongly to 1 disagree strongly. Please provide comments.

We welcome the inclusion of passenger representation on the national supervisory board. We strongly agree with the suggestion that the plan needs to be informed by public views of bus services. Transport users must have a voice that is heard and holds providers to account in a more focused, sustained way than currently and the proposed scheme draws

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<sup>14</sup> See note 4



attention to monitoring and measuring performance being vital. Transport Focus has built an enviable reputation for independent, multi-modal representation, built on top quality insight and policy work which is useful to transport decision makers, together with experience of building alliances in various partnership models with authorities, operators and governments. We can support development of user-focused measures and provide an evidence-based approach to ensuring user priorities remain at the heart. We would be keen to discuss how we can provide effective support for Welsh Government's proposals and the national supervisory board, to strongly articulate the passenger voice and highlight actions to address barriers for new and potential users and promote an attractive service to support active travel, encourage modal shift and help drive up patronage.

Specifications and targets must stretch service providers to take passenger satisfaction to higher levels across Wales. This should apply both for the network as a whole and at a more localised level, as well as potentially aiming at travelling more actively and sustainably. There is a need to achieve greater consistency of performance across the component parts of the network and also to drive satisfaction on all aspects of service delivery upwards, to bring the whole of transport provision up to the achievements of the best comparators. Strengthened evidence will ensure robust and flexible decision making. We would recommend using independent passenger research and assessment with comparison and benchmarking across nations, regions and modes.

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

Transport Focus is rebuilding its major passenger satisfaction surveys. Our new bus survey *Your Bus Journey* would provide support in tracking the impact of policies and interventions on passenger satisfaction. Continuous data collection, rolling monthly headlines, six-month summary and full results on annual figures – plus regular full, official results and deep dive analysis on national data – provide robust metrics that can be used as franchise targets, with benchmarking against other nations and regions. We would welcome discussions on how our insight can help drive and evidence the improvements you seek.

#### Question 5

Do you agree that there is a need for regional consideration and coordination of bus network plans by Corporate Joint Committees, before combining them at a national level? Please score from 5 agree strongly to 1 disagree strongly. Please provide comments.

Local authorities need to work together. Buses cross local authority boundaries and borders between nations. Journey to work areas do not respect local authority boundaries. Although Transport Focus does not have a firm view as the best structure in which to bring local authorities together, the proposal for bringing planning and transport together at a regional level through Corporate Joint Committees looks like a promising agenda. However, it remains to be seen how this dynamic works in practice and how co-ordination with Transport for Wales will achieve the wider integration and network growth that passengers want – so there needs to be visibility for passengers of the decisions and recommendations made.

#### Question 6

Do you agree that letting and managing contracts at the national level by the Welsh Government through Transport for Wales offers the best opportunity to pool franchising expertise, deliver economies of scale? Please score from 5 agree strongly to 1 disagree strongly. Please provide comments.

We accept that there may be a potential benefit of economies of scale and consistent minimum standards from letting and managing contracts at the national level, provided that local needs do not become lost. Also there is opportunity to underpin standards and redress into a single passenger charter for Wales. Expertise is a key need, but it is not currently clear where some of that may be drawn from. However, it is important that passengers and passenger representatives are consulted on contract specifications, to ensure their priorities are at the core.

We would like to see expectations underpinned by a passengers' charter for Wales giving bus users rights to certain standards of service, including punctuality, vehicle cleanliness, proportion of services operated, information and redress. This should include mechanisms for redress at a local level and means to ensure these standards are met, backed with action at national level. Transport Focus has good experience in this field, including providing support and guidance to English authorities for the National Bus Strategy<sup>15</sup>. We would welcome further discussions and the opportunity to assist.

#### Question 7

Do you agree with the need for a duty to ensure plans are designed to be affordable? Please score from 5 agree strongly to 1 disagree strongly. Please provide comments.

It is clearly important that plans are affordable, but we would need to see more detail on how this will be judged. In England, affordability is a statutory requirement, alongside value for money for the taxpayer. A detailed business case will be required to analyse income and expenditure, with sensitivities, and an explanation of how the upfront investment required in the short- to medium-term will be achieved.

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<sup>15</sup> [Transport Focus guidance and briefings for National Bus Strategy](#), Transport Focus. 2021

It is essential for investment plans to have forward planning informed by passenger priorities. Transport Focus has extensive experience with the five-year funding periods on the railway, which give greater visibility of funding and reassurance for investment. We are currently working with Network Rail and industry colleagues to inform plans for the railway in Wales ahead of control period 7 (2024-29), with robust evidence from our research.

#### Question 8

Do you agree that the proposed powers to make regulations and guidance are suitable to ensure franchises are let successfully and sustainably? Please score from 5 agree strongly to 1 disagree strongly. Please provide comments.

Powers need to be balanced; aware of the risk of guidance placing unreasonable requirements, which would create barriers by making putting together a proposal time-consuming, expensive and legally risky.

Also ensuring that the power to make regulations and issue guidance, for example in relation to the setting of minimum standards to be included in contracts, is not at the expense of passengers and their representatives' right to be consulted.

#### Question 9

Do you agree with the proposed requirement to consider the impact on SME bus operators when franchising? Please score from 5 agree strongly to 1 disagree strongly. Please provide comments.

Transport Focus agrees with the proposal. We want to maintain and expand off-road competition, and this necessarily involves small and medium-sized bus operators. This is also a requirement in the legislation in England.

#### Question 10

Do you agree with the benefits of establishing a mechanism to allow a public service Operator of Last Resort to ensure services keep running if a franchise fails? Please score from 5 agree strongly to 1 disagree strongly. Please provide comments.

Transport Focus agrees with a mechanism to allow an operator of last resort. It is important that someone can step in if an operator is unable to deliver. Our experience with the railway has seen this work well in that sector.

#### Question 11

Do you think further specific legislative provisions are needed for the transitional period until franchising is introduced? Please provide comments.

Yes. There is a need to ensure there is a smooth transition from the current deregulated model to a new franchising model: unsuccessful bidders may decide to walk away, so there needs to be a facility for keeping the buses running in those circumstances until franchising is up and running.

Passengers will be rightly concerned about the prospect of a lengthy transition and lag in implementation, which may see a potential for the network to deteriorate further and investment to be undermined. How will Welsh Government be making the most for passengers from the Bus Emergency Scheme and partnership working, to overcome stagnation in planning and relationships and give Wales the best opportunities during the transition to franchising? Alongside this, how can the good investment model from commercial operators be replicated within future plans, to enhance the benefits for transport users?

#### Question 12

Do you agree that local authorities should be able to run bus services directly? Please score from 5 agree strongly to 1 disagree strongly. Please provide comments.

#### Question 13

Do you agree that local authorities should be able to set up arms-length companies to operate local bus services? Please score from 5 agree strongly to 1 disagree strongly. Please provide comments.

#### Question 14

Do you agree that local authorities should be able to invest in or acquire bus companies? Please score from 5 agree strongly to 1 disagree strongly. Please provide comments.

#### Question 15

Do you agree that municipal bus companies should be able to raise fund by borrowing or selling shares? Please score from 5 agree strongly to 1 disagree strongly. Please provide comments.

#### Question 16

Are there any additional safeguards you would like to see applying to the use of these powers? Please provide comments.

Transport Focus experience with our Bus Passenger Survey over the years has found that many of the smaller, independent and municipal bus companies do very well when it comes to measuring passenger satisfaction. In our 2017 survey<sup>16</sup>, the highest overall satisfaction results in Wales were with TrawsCymru services at 94 per cent. The capability for supporting and underpinning this type of service provision and performance as part of the overall network provision will be very valuable for passengers.

#### Question 17

Are there any further comments you would like to provide on the content of this white paper?

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<sup>16</sup> See note 4

### Question 18

Do you have any comments on the draft Regulatory Impact Assessment published alongside this paper?

While we welcome the Draft Regulatory Impact Assessment, and understand the reason for assessing a different model of franchising to allow for a fair comparison with alternative options, a full business case should be developed for the proposed model of franchising to enable a judgement as to whether it is affordable.

### Question 19

We would like to know your views on the effects that the proposals would have on the Welsh language, specifically on opportunities for people to use Welsh and on treating the Welsh language no less favourably than English. What effects do you think there would be? How could positive effects be increased, or negative effects be mitigated?

### Question 20

Please also explain how you believe the proposals could be formulated or changed so as to have positive effects or increased positive effects on opportunities for people to use the Welsh language and on treating the Welsh language no less favourably than the English language, and no adverse effects on opportunities for people to use the Welsh language and on treating the Welsh language no less favourably than the English language.

Good access to Welsh culture can provide strong attraction for leisure journeys. Our work on getting passengers back on buses<sup>17</sup> included asking reasons for travelling more. This found one of the top reasons is people making more journeys for leisure purposes. However their choice of mode is likely to have a high degree of discretion, so attractive transport options need to be provided, or they may choose to drive instead.

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

### Question 21

We have asked a number of specific questions. If you have any related issues which we have not specifically addressed, please use this space to report them.

It is vital for the interests of transport users and potential users to be promoted and protected as a key principle. The Bus Services Act 2017 legislation sets out a duty to consult on proposed schemes. Transport Focus<sup>18</sup> is named as a statutory consultee. As a trusted independent advocate, we use our experience and extensive research to provide evidence and guidance to ensure that plans and schemes have those interests at heart.

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<sup>17</sup> See note 1

<sup>18</sup> Transport Focus is the operating name of the Passengers' Council

This responsibility has enabled us to influence decision-makers on behalf of transport users through guidance and response to improvement plans for the National Bus Strategy in England and through our position on a number of bus alliance boards. In Wales we have a seat on the Welsh Government Transport Performance Board, to provide representation on behalf of transport users. However we would also advocate for a similar consultation duty to be written into requirements, to ensure a strong user voice is always heard.

## Conclusion

The key challenge is whether bus reform proposals reflect the needs and priorities of both existing and potential passengers. The closer that the specifications and targets reflect people's needs, the better the chance that they will deliver the type of services that people want and value and will draw in new users to grow the market and support modal shift.

In summary, we would be looking for bus reform to consider some very key aspects to ensure it meets the needs of users and potential users:

- Ensuring that priorities identified via our research are at the very heart of proposals
- Understanding and addressing the key barriers to bus use
- Creating an attractive, accessible network that encourages modal shift and links effectively with active travel opportunities
- Ensuring passengers and stakeholders are involved in the development of a passengers' charter – co-production is vital

Transport Focus has a wealth of research and extensive experience of working with passengers and stakeholders in the bus industry as well as across modes and stands ready to support Welsh Government and key stakeholders in the development of the proposals going forward.

We believe we can play a useful role helping to improve bus services by designing and carrying out passenger satisfaction and other passenger research and by advising on the following matters:

- Development of a Passengers' Charter
- Improvements to complaints procedures
- Methodology for monitoring performance against passenger growth, punctuality and reliability targets, with sufficient granularity to identify areas which require adjustment to plans
- Methodology for assessing performance against Passenger Charter commitments and on complaints handling
- Consultation with passengers on how well the network is working
- Passenger information improvements
- Transparency and reporting of performance to passengers.

**June 2022**

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## 10 actions to benefit and attract passengers

### Appendix 1

Proposals for new legislation have the potential to improve the bus journey experience and hence satisfaction for bus passengers and potential passengers. Transport Focus has a wealth of experience and research on a range of factors for improving services. We set out here what could be included in franchise conditions, specifications and targets to help realise that potential.

#### 1. Improving punctuality and reliability

Bus passengers rank punctuality and running on time highly as priorities for improvement. Lateness of a bus arriving at a stop to start the journey causes more anxiety than a bus arriving late at the destination<sup>19</sup>. Passengers can tolerate the arrival at the bus stop of departure up to five minutes late. After that satisfaction with punctuality decreases markedly, and again after 10 minutes. The new arrangements should:

- Have clear punctuality targets
- Targets for improving average bus journey speeds
- Include a statement on monitoring performance and publishing data.

#### 2. Ensuring frequency and stability of bus times

Alongside punctuality, passengers want to know that the timetable doesn't change too frequently. Our research<sup>20</sup> found that passengers did not think it was acceptable to make changes to services more than twice a year and more than six out of ten wanted to be given at least four weeks' notice of a major change. The new arrangements should ensure that:

- There are minimal changes to timetables
- There is a clear process for consulting and informing passengers of changes.

#### 3. Building trust: engagement and consultation

Buses need to run on time, be reliable, deal well with disruption and offer value for money. Previous research<sup>21</sup> shows that building a relationship with passengers helps build loyalty and repeated use of services. More recent evidence<sup>22</sup> backs this up. Passengers should feel that the company really cares about what happens to them, especially during disruption, and is not remote and aloof. Drivers have an important role in showing empathy and care (see 7 below). Proposals should require an engagement strategy with both passengers and potential passengers.

#### 4. Monitoring passenger satisfaction to make improvements

It is important for operators and authorities to research (quantitatively and qualitatively) how satisfied passengers are with services both on the bus and at the stop. Transport Focus's new *Your Bus Journey* survey provides such an independent assessment which could be used providing vital feedback on important factors such as punctuality and cleanliness. A similar measure is used in rail to assess the passenger experience during a franchise. Plans should establish targets for service quality, how they will be measured and results published.

#### 5. Passenger information in real-time

Real-time information displays are valuable in indicating to passengers when their bus will arrive, so reducing stress and anxiety and enabling them to make alternative plans when things go wrong<sup>23</sup>. This was reinforced in our work with young people<sup>24</sup> on their experience of buses. Proposals should make more data available for public use and set out actions for providing more comprehensive real-time information – especially at bus stops and through developing apps.

<sup>19</sup> [Bus punctuality and timetables](#), Transport Focus. January 2014

<sup>20</sup> [Bus service changes](#), Transport Focus. October 2010

<sup>21</sup> [Trust, what to improve and using buses more](#), Transport Focus. March 2016

<sup>22</sup> [The route ahead: getting passengers back on buses](#), Transport Focus. June 2021

<sup>23</sup> [Bus passengers' experience of delays and disruption](#), Transport Focus. April 2013

<sup>24</sup> [Using the bus: what young people think](#), Transport Focus. February 2018



## 6. Improving fares and ticketing

Better value for money is a significant priority for improvement. It is also linked to getting a punctual, reliable serve and a seat in return for payment. Our research<sup>25</sup> has found that passengers often have poor information on fares and ticketing and types of tickets, often relying on word or mouth or the bus driver. Younger passengers<sup>26</sup> have distinct needs relying heavily on bus travel. They require service flexibility but also resent paying adult fares. Smart ticketing can help with some of these issues and the new arrangements should

- Provide a central source of pre-journey information on fares, ticket types (including smart ticket availability) and bus routes
- Implement specific policies for young people, such as the range of tickets and price.

## 7. Boosting the role of bus drivers

They are the ‘face of the company’ providing the main contact with passengers. For a good passenger experience, they should provide a pleasant and professional service whether by providing information on disruption, delays, or ticket types, or settling disputes. The Bus Passenger Survey<sup>27</sup> shows their role is a key driver in turning a good journey into a great one. Plans should therefore:

- Set standards of behaviour for drivers
- Provide training courses programmes that include customer service.

## 8. Customer care and satisfaction

Despite the best intentions, things will go wrong from time to time. An effective complaints system makes it easy for passengers to know who to contact and a range of ways to do so; has efficient handling systems; and uses the resulting data to make improvements<sup>28</sup>. This is highlighted in our guidance series<sup>29</sup> to authorities in England setting out bus service improvement plans. The new proposals should set out

- Clear complaint handling processes and lines of responsibility
- How contact details will be publicised
- What response times will be and how they will be reported upon
- Clear guidance on where, when and how compensation will be offered.

## 9. Improving personal security

This features in our research both on the bus and at the stop, particularly for those with disabilities<sup>30</sup>. New plans should ensure that partners work together to deal with anti-social behaviour and that security is included in design guidelines for buses and stops.

## 10. Encouraging non and infrequent users

A key aim of the White Paper is to increase bus use. Our research<sup>31</sup> shows why current non users don’t use the bus: poor punctuality, failure to provide services when people want to travel (such as for work or a night out), length of journey and not knowing ‘the system’. We found that 28 per cent of non users would support a bus service. This is backed up by our research with young people<sup>32</sup> and more recent research<sup>33</sup>. Therefore, plans must include strategies for addressing these barriers to boost bus use.

<sup>25</sup> [Bus passenger views on value for money](#), Transport Focus. October 2013

<sup>26</sup> See note 24

<sup>27</sup> [Bus Passenger Survey 2017](#), Transport Focus. March 2018

<sup>28</sup> [Handling complaints and appeals from bus passengers](#), Transport Focus. October 2009

<sup>29</sup> [National Bus Strategy guidance documents](#), Transport Focus. August 2021

<sup>30</sup> Analysis of bus passenger satisfaction for those who have a disability, Transport Focus. 2016

<sup>31</sup> See note 21

<sup>32</sup> See note 24

<sup>33</sup> See note 22