

## Updated priorities for the Senedd Climate Change, Environment and Infrastructure Committee (September 2023)

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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 contribute to the Committee's priority setting process. Our response is informed by our evidence base and insight gathered across our work in Wales. This submission builds upon our [response](#) to the original set of priorities in September 2021.

We broadly agree that the three key priorities remain relevant. We do still feel, however, that transport is often underrepresented. It is important that the topic does not get lost in the wider priority 'sustainable communities'. There is a concern that transport could become a 'bolt on' rather than be embedded. Transport cuts across the three priority areas and is key to addressing some of the very pressing climate change issues and should therefore be afforded sufficient focus. Transport is not just about getting people from A to B. It needs also to be considered in the wider context of the Government's agenda of tackling loneliness and social isolation. The wider context is recognised within the Wales Transport Strategy 'Llwybr Newydd'.

### What matters to passengers – what our research tells us

Post covid recovery on public transport has been relatively slow, particularly for the commuter market which has suffered through increased working from home, although leisure travel has remained buoyant. The Welsh transport strategy aims for less journeys, but it is important that where people do travel, they are encouraged to make sustainable choices. It will be important to consider what matters to passengers to address key barriers to modal shift and are pleased to see that there will be ongoing research into this area to support future strategy.

Our recent 'What matters to rail passengers'<sup>1</sup> research indicates that price of tickets offer value for money is a number one priority for passengers in Wales, followed by punctuality and reliability and getting a seat on the train. The full set of priorities is attached in the Appendix. The current economic climate will drive user choice of transport mode, so it is important to focus on ensuring public transport offers value for money and becomes the

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<sup>1</sup> [What matters to rail passengers](#). Transport Focus. December 2022

mode of choice. Our research shows that generally there are some discernible differences when you consider different variables such as gender. Female passengers, for example, attach increased importance to personal security than men and rate information provision highly. Men are more inclined to rate ease of buying a ticket highly. In terms of disability, ability to get a seat and accessibility feature more prominently than the general population as would be expected. Looking at ethnicity, white British passengers are more likely than average to say value for money and reliability are particularly important to them. Passengers from an ethnic minority background place greater importance on a range of factors, such as accurate information including during disruption, personal security and journey speed. However, there is a smaller proportion of leisure passengers among ethnic minority travellers, and this may have more of an influence on their views than their ethnicity.

Passenger satisfaction with rail in Wales has been in decline for the past year as highlighted in our most recent rail user survey<sup>2</sup> with Transport for Wales currently on a downward trajectory and ranked bottom in terms of passenger satisfaction compared with all other operators. Current satisfaction on the key metrics stands at – overall satisfaction, 72 per cent, punctuality and reliability 59 per cent, and value for money 51 per cent. It is recognised that there is a huge amount of disruptive work ongoing as part of the transformation of the valleys and challenges related to bringing in new fleet, but if passengers in Wales are to be encouraged to travel more sustainably, more needs to be done to drive reliability into a better position.

It will be important to ensure that public transport remains an attractive proposition. Our post-covid research<sup>3</sup> shows that ensuring punctuality and reliability of buses is crucial to higher use, especially for commuters and young passengers. The soon to be implemented 20 miles per hour zones in Wales may represent a challenge in relation to bus reliability. Local authorities and bus operators will need to work together to ensure timetables meet the needs of those who need to travel, particularly those who may be more disproportionately affected such as those in black and minority ethnic (BAME) groups, women, school children, passengers with disabilities and older people etc. The Wales transport strategy puts sustainable modes at the top of the hierarchy, but roads strategy will still be a part of the overall mix. This was recognised in the report of the Roads Review Panel and Welsh Government response<sup>4</sup>, with the need to deliver schemes that contribute meaningfully to modal shift and being consistent with Welsh Government policy to prioritise public transport and active travel.

We know through our exploratory research<sup>5</sup> with our transport user panel that concessionary pass holders may need more encouragement to return to transport. They

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<sup>2</sup> [Rail User Survey Operator Results](#). Transport Focus. September 2023

<sup>3</sup> [The Route Ahead: getting passengers back on buses](#) Transport Focus. June 2021

<sup>4</sup> [Welsh Government response to the Roads Review](#) Welsh Government. February 2023

<sup>5</sup> [Getting free bus pass holders back on board](#). Transport Focus. July 2022

are also a group which is likely to be most adversely affected by rationalisation and cessation of bus routes. Half of current bus users on our panel who hold a free bus pass or who are eligible to do so say that the way they use buses has changed since the start of the pandemic. 38 per cent say that they are using buses less frequently now in comparison to just 13 per cent who say they are using buses more frequently.

We are currently undertaking some work in partnership with Transport for Wales' bus team focusing on bus infrastructure in Wales. This research explores what matters to people in terms of physical infrastructure and the information passengers need in advance of and during their journey; identifying potential barriers and informing the development of standards. We would be happy to share this with you once the report has been published, which is expected this autumn.

Uncertainty around long term bus funding is already manifesting in some routes being cut and passengers and operators alike will need reassurance that a new approach will bring about the changes needed to enable them to be confident public transport in future will deliver improvements on the current offer. There are ongoing challenges relating to bus driver recruitment and retention which need to be factored into the overall strategy.

Demand responsive transport will continue to be a fundamental part of the public transport mix, filling in gaps in bus services, particularly in rural areas. We have seen how the fflecsi service has been well received in Wales. Our recent research in partnership with Transport for Wales reviewed the fflecsi pilots operating across different parts of Wales and also looked at schemes in other areas. The research was in two phases, with an interim report<sup>6</sup> taking in views across a number of initial pilot schemes, followed by an updated report<sup>7</sup> with findings from the scheme in Newport. We found that once people understood the fflecsi offer, they generally saw it as innovative and a modern solution to local transport and many have found using an app to book a ride is particularly appealing. Bus drivers have played a key role in explaining how the service works, although more emphasis on promotion and education will be essential for people to appreciate that it is for everybody.

For some, giving up their car will be a challenge, but electric vehicles may represent a more sustainable option to petrol and diesel. We can see there is a focus on rolling out EV charging across Wales. We have conducted some recent research<sup>8</sup> in this area which looks at the user experience of electric vehicles. Frustrations with public charging points could be largely categorised into three categories:

### **Reliability**

- Users have experienced faults and sometimes those raised are not addressed in a timely manner. A range of apps for different providers causes irritation and

<sup>6</sup> [Fflecsi – the experience of Demand Responsive Transport in Wales](#) Transport Focus. February 2022

<sup>7</sup> [Fflecsi – updated report – findings from passenger research in Newport](#) Transport Focus. August 2022

<sup>8</sup> [Plugging the gap – drivers' experiences with electric cars](#). Transport Focus. September 2021

sometimes drivers noted that apps do not always ‘talk’ to the charger. Whilst facilities are generally 24 hour, there is frustration that customer support is not.

### Complexity

- Users want charging a car, including the payment process to be as simple as with a petrol or diesel car or even more simple, for example recognising who you are and billing you behind the scenes. As a minimum, they want contactless payment options. There is a feeling that the system is overly complicated due to a range of providers.

### Physical

- Physical location of charge points is a moot point with users – they want to be sheltered from the elements as they would at a petrol station. A sense of personal security at charging points was also raised – sometimes they are located at the periphery of a site and sometimes in areas that are poorly lit.
- Ability to easily locate a charge point is an issue, particularly in large car parks. Any associated signage is deemed to be less favourable than at petrol stations. Sometimes charge points also share space with other facilities such as air and water – this can be problematic.
- Sometimes charge points can be located on private land and blocked off out of hours or can be in a small space which is difficult to manoeuvre in and out of.

A key priority for improvement identified by users was more accurate charger location information. Users noted that they find charging points that are not listed, or that they are points which are not open to the public. Coupled with this is access to real-time information about whether points are working, to ensure they do not make wasted journeys. Better tools to estimate battery charge to account for things like the weather (needing to put the heating on high in cold weather), wind resistance, weight of luggage in vehicle, bikes being carried etc. A more intuitive on-board facility to make suggestions about nearby charge points was also referenced as a potential improvement for the future.

### Funding and investment and the wider Government strategy

Funding is likely to be a challenge for the railway, with constraints on the determination for Network Rail in control period 7 (2024-29). Transport Focus worked with Network Rail Wales and Western Region to research passenger priorities for the region’s business planning<sup>9</sup>. The key message from this is to focus on the fundamentals of punctuality, reliability and capacity. These are in the top tier of expectations alongside maintenance, environment and sustainability and safety of passengers. Our report noted that it is crucial for the key metrics of punctuality and reliability to be held sacrosanct and they cannot be allowed to deteriorate.

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<sup>9</sup> [Network Rail Wales and Western region: passenger research for 2024-29 business plan](#) Transport Focus. March 2023

In terms of rail, it is still unclear how the devolved nations will factor into the Great British Railways strategy. We know from our research that the things that matter to passengers are value for money, reliability and punctuality, but they are also concerned about complexity of using public transport. Some parts of the rail system are very fragmented such as the very complicated ticketing system which can be difficult for passengers to navigate. There are also considerations relating to how joined up major projects are – new infrastructure and increased capacity set alongside ageing infrastructure and squeezes on investment funding. These are big discussions and Wales needs to be integral to these. There is general acceptance that we cannot continue to work the way we have been, with old systems trying to work in a new world – the way people travel has changed, particularly post covid and rail needs to develop to meet the needs of the way passengers need to travel today and in the future.

### **Transport – a pivotal role in the climate change agenda**

We are heartened to see there are plans to continue research on behavioural change in relation to modal shift and active travel. This will be a key piece of work to underpin future strategy. We are, however, disappointed that the National Travel Survey which was to be central to Llwybr Newydd published in 2021 has yet to come to fruition. Without a firm understanding of travel needs and aspirations of people in Wales, it renders effective targeting of financial resource and physical effort challenging.

A key piece of legislation will be progressing through the Senedd in the next term in the form of the Buses Bill. It will be fundamentally important to ensure that sufficient time is given to scrutinise the bill to ensure it delivers for passengers that rely on public transport. We have extensive research on buses and as an organisation are currently involved heavily in the National Bus Strategy work in England as part of our role of statutory consultee. We have gathered a wealth of experience and best practice in bus service improvement plans and would be keen to work with you and share what we have learnt. We have supported operators via delivery of webinars and guidance documents<sup>10</sup> covering a wealth of topics such as passenger charters, target setting, passenger representation and what passengers want, as well as working with authorities in Greater Manchester and Liverpool City Region, providing insight to inform their bus franchising plans.

We have also recently introduced our new ‘Your Bus Journey’ survey to support enhanced partnerships in gauging passenger satisfaction. It will be crucial to ensure that passengers are brought along with and are involved in the new plans for buses in Wales. The Buses Bill will coincide with further transport developments in Wales such as the opening of the bus interchanges, in Cardiff, for example. It is a real opportunity for Wales to showcase a fully multi-modal approach with links to rail – all assisted by major hubs coming under a single TfW remit. We would encourage the committee to work with us and to capitalise on the breadth of experience we have in this area.

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<sup>10</sup> [National Bus Strategy guidance](#) Transport Focus. 2022-2023

## Conclusion

We consider that transport is currently underrepresented in terms of the Committee's priorities, yet plays such a pivotal role in supporting the Welsh Government's long term strategy and climate change agenda. There is a risk of transport being sidelined rather than being viewed as a key enabler across policies, without having the 'air time' it requires. There are some major plans in the transport sphere which will warrant close scrutiny – we would advocate that the committee allocates sufficient time to this.

Key pieces of legislation such as the Buses Bill will need scrutiny in terms of policy and effective implementation – as well as proper scrutiny and holding to account for current performance and service delivery. Major projects in Wales affecting transport should rightly feature in the Committee's agenda, such as Valleys transformation and wider metro schemes. However wider schemes will also impact on Wales either directly or indirectly such as HS2 and Great British Railways. The committee must not lose sight of the wider impacts of these schemes.

We have a wealth of research on transport and what matters to users. We stand ready to assist the Committee with its forward schedule and will continue to share our regular research output with the Committee and our key stakeholders across Wales and borders, as well as through positions on Welsh Government's transport performance board and Transport for Wales advisory panel. We would like to see passengers and potential passengers involved at the very heart of Welsh Government transport strategy.

## September 2023

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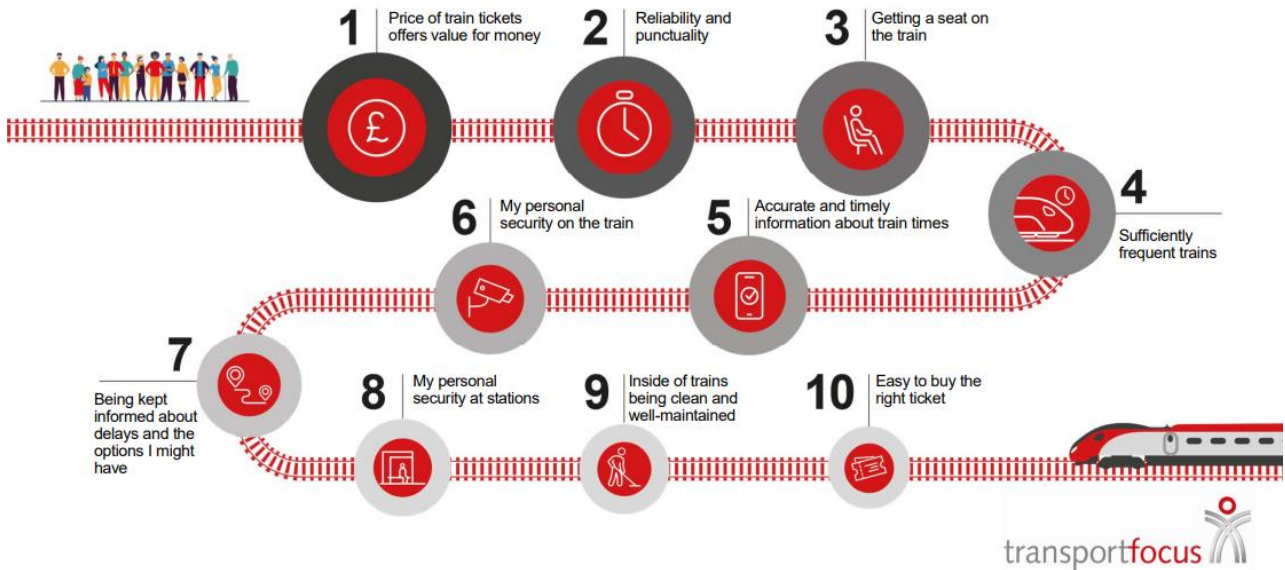
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Appendix

# What matters to rail passengers in Wales 2022

quadrangle



- 11. Quick journey times
- 12. A railway that can cope with adverse weather events (snow, wind, flooding and extreme heat)
- 13. Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.
- 14. Comfortable seats on trains
- 15. Well-maintained, clean toilets on the train
- 16. Good connections with other train services
- 17. Good connections with other public transport at stations
- 18. Engineering works planned to keep passenger disruption to a minimum
- 19. An environmentally responsible railway that is reducing its carbon emissions
- 20. Helpful staff at stations
- 21. Stations being clean and well-maintained
- 22. Helpful staff on trains
- 23. Reliable Wi-Fi and mobile reception on trains
- 24. Sufficient space on the train for luggage
- 25. Easy to claim compensation when delayed

Icon size in the red circles relates to what matters to rail passengers. The more important, the larger the icon.