

National Assembly for Wales
Enterprise and Business Committee

Integrated Public Transport in Wales

May 2013



Cynulliad
Cenedlaethol
Cymru

National
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Wales

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The Committee was established on 22 June 2011 with a remit to examine legislation and hold the Welsh Government to account by scrutinising its expenditure, administration and policy, encompassing economic development; transport and infrastructure; employment; higher education and skills; and research and development, including technology and science.

Current Committee membership



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Welsh Conservatives
Monmouth



Mick Antoniw (from 24.04.13)
Welsh Labour
Pontypridd



Byron Davies
Welsh Conservatives
South Wales West



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Welsh Labour
Aberavon



Ken Skates (until 24.04.13)
Welsh Labour
Clwyd South



Joyce Watson
Welsh Labour
Mid and West Wales

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The Committee's Recommendations

The Committee's recommendations are listed below in the order that they appear in this Report. All our recommendations are directed at the Welsh Government. Please refer to the relevant pages of the report to see the supporting evidence and conclusions. We recommend the Welsh Government should:

Recommendation 1. Continue to lobby the UK Government for a statutory relationship between the Welsh Government and Network Rail, including devolution of powers to specify high level outputs for Welsh rail infrastructure, similar to the powers of the Scottish Government. (Page 15)

Recommendation 2. Continue to lobby the UK Government for an enhanced role in the rail franchising process as it affects Wales, particularly powers to specify franchise agreements that comprise predominantly Wales-only services, such as the current Wales and Borders Franchise. (Page 15)

Recommendation 3. Continue to lobby the UK Government for bus regulation and registration powers to be devolved to Wales, including making the Traffic Commissioner for Wales accountable to the Welsh Ministers. (Page 15)

Recommendation 4. Use all the powers at its disposal to drive public transport integration, and ensure staff at all levels of government have the skills and tools to deliver effective public transport policy. (Page 17)

Recommendation 5. Exploit the opportunity presented by the renewal of both the National and Regional Transport Plans to promote integrated public transport and ensure effective coordination and delivery of policy at national and regional levels. (Page 17)

Recommendation 6. Ensure that changes to the planning system to be introduced through the forthcoming Planning Reform Bill include a strengthened requirement for all major development schemes to (a) include adequate public transport provision and actively promote sustainable, integrated public transport or else they will be refused planning permission; and (b) consult transport planning bodies at an

early stage, including those schemes funded by the Welsh Government. (Page 20)

Recommendation 7. Ensure that walking and cycling links to public transport services and infrastructure are prioritised in delivery of the Active Travel (Wales) Bill, and take steps through wider bus and rail policies to enhance walking and cycling infrastructure and provision for bikes on buses and trains. (Page 20)

Recommendation 8. Establish appropriate delivery mechanisms to mainstream transport planning across the work of all Welsh Government departments, particularly in relation to access to health, education and social services. (Page 20)

Recommendation 9. Ensure that the integrated transport task forces established in north Wales and south east Wales lead to clear, costed delivery plans that take account of wider policy areas such as health and land use planning. (Page 20)

Recommendation 10. Establish whether effective use is being made in Wales of provisions under the Transport Act 2000 (as amended) to improve bus services, and promote their implementation to facilitate greater cooperation and coordination of services. (Page 26)

Recommendation 11. Move towards greater regulation of the bus market in Wales, including consideration of a franchise approach to bus route/network tendering based on supply side competition. (Page 26)

Recommendation 12. Ensure that new bus funding arrangements and Regional Bus and Community Transport Network Strategies prioritise service coordination and high quality information, including quality standards and restrictions on the frequency of timetable changes. (Page 30)

Recommendation 13. Establish whether the duty to develop bus information schemes under the Transport Act 2000 is being met by Welsh local authorities and provide support to ensure compliance. (Page 30)

Recommendation 14. Press all transport operators to work together and with relevant stakeholders to implement best practice in coordinating timetables, connecting services and publishing real time

information to provide seamless links between bus, rail and community transport networks. (Page 30)

Recommendation 15. Develop a fully integrated public transport ticketing scheme for Wales across all transport networks as a priority alongside delivery of the GoCymru e-purse. (Page 33)

Recommendation 16. Identify best practice in developing public transport interchanges and facilities, and work with stakeholders to develop and implement standards for the provision of such infrastructure. (Page 35)

Recommendation 17. Revisit the ten recommendations made by the Equality of Opportunity Committee on the accessibility of transport services for disabled people, and update us on progress made in implementing those recommendations. (Page 37)

Recommendation 18. Develop a thorough understanding of passengers' needs to inform Network Rail's Long-Term Planning Process and the new Wales and Borders Rail Franchise. (Page 38)

Recommendation 19. Ensure inter-modal integration is a key component of the new Wales and Borders Franchise, which should encompass integrated information, ticketing and timetabling. (Page 38)

Recommendation 20. Roll out the Bwcabus model to rural areas in Wales not currently connected to the main bus network. (Page 39)

Recommendation 21. Work with relevant stakeholders to deliver consistent and high quality community transport provision across all the Regional Transport Consortia. (Page 40)

Recommendation 22. Increase support for innovative community transport schemes and promote good practice to maximise the opportunities offered by the sector, particularly to provide services where there is commercial market failure. (Page 40)

Recommendation 23. Provide greater certainty over longer-term funding to enable community transport operators to plan and invest in the future. (Page 41)

Recommendation 24. Identify and resolve inconsistencies between local authorities on whether they not only allow, but also encourage, community transport operators to tender for commercial bus services. (Page 42)

Recommendation 25. Aim to strengthen regional transport structures so that they have the executive powers and capacity to plan and deliver all elements of integrated transport, including a thorough evaluation of the Passenger Transport Executive model. (Page 48)

Foreword

Integrated public transport is
“a devilishly complicated thing to achieve”¹

1. There is a “silent problem” of transport poverty in Wales. A quarter of all households do not have a car and in Merthyr and Blaenau Gwent, that figure is as high as 36%. More than 1.5 million people are isolated and unable to access key services because of “inadequate” public transport.²

2. We therefore agree with the comment in the Wales Transport Strategy that public transport is a “lifeline”,³ not only for sustaining communities but also for enabling Wales to compete for inward investment and business with other parts of the UK.

3. Our vision is for passengers to experience an easy, seamless, comfortable public transport system in Wales which links up across the country as a whole and that citizens can understand and trust. The need to improve transport integration in order to maximise effectiveness and use of private and public sector investment is even more acute in this current financially challenging climate.

4. However, it became obvious right from the start of our inquiry that public transport integration in Wales is sadly lacking, particularly in rural areas. Local examples of integration may exist but they are few and far between; current policy structures and funding are not conducive to integration; and there is a worrying lack of ambition and imagination among some of the individuals and organisations who are key to the planning and delivery of integration.

5. We therefore need a step change from all stakeholders: stronger vision and leadership for achieving integrated public transport, and all bodies working together more effectively to deliver that vision.

6. We engaged directly with public transport users in gathering evidence. Our “world café” (public engagement) event in Swansea provided a solid evidence base to inform our inquiry, supplemented by a separate online survey on our website to canvass the views of public

¹ Record of Proceedings paragraph 206, 21 November 2012

² Sustrans written evidence paragraph 7 and Record of Proceedings paragraphs 192-193, 21 November 2012

³ Welsh Government, Wales Transport Strategy, May 2008, p46

transport users. Three Members of our Committee also captured their experiences of travelling by public transport by compiling a video diary of their journeys. Their videos can be viewed on our [website](#).

7. We do not plan in this report to dwell on the many obstacles to public transport integration as they are well articulated in the written and oral evidence submitted to the inquiry, and documented in Annex B. Rather, we wish to focus on how those problems can be overcome, and to suggest ways in which the Welsh Government can help in that process.

8. We have structured our report around what we regard as the essential elements to effective public transport integration:

- overarching vision and strategy;
- integration of policy and land use planning;
- collaboration between bus operators;
- coordination of transport timetables and information;
- integrated fares and ticketing;
- quality transport infrastructure and interchanges;
- community transport and demand-responsive public transport;
- integrated structures, planning and delivery.

9. Above all, full integration will depend on having the political aspiration at national and local levels, and everything in between. That means not only having the appropriate structures but also the people with the right skills and capacities working within the system.

10. Inevitably our recommendations are focused on where we have a remit, which is on the strategies, policies and funding of the Welsh Government. However, we have also highlighted in this report a number of areas where we believe further devolution of powers would contribute to a more integrated public transport system for Wales. We have written to the Commission for Devolution (the “Silk” Commission) to suggest that Part 2 of its review could look at the following areas:

- a statutory relationship between the Welsh Government and Network Rail. This might include devolution of powers, with appropriate funding, to specify high level outputs for Welsh rail infrastructure, similar to the powers of the Scottish Government;

- an enhanced role in the rail franchising process as it affects Wales, particularly powers to specify franchise agreements that comprise predominantly Wales-only services (passenger services that start and end in Wales), such as the current Wales and Borders Franchise; and
- bus regulation and registration, including making the Traffic Commissioner for Wales accountable to Welsh Ministers.

11. Finally, we have carefully considered the evidence on how best to plan and deliver integrated public transport at the local and regional level. We are convinced that proper integration needs stronger regional structures that can bring everything and everyone together. We have recommended to the Welsh Government that it consider the case for a Passenger Transport Executive model designed in, and for, Wales.

Introduction to the inquiry

12. Our inquiry into integrated public transport in Wales focused on rail, bus and community transport. The main aims of the inquiry were to explore how well public transport is integrated; which factors limit integration; how successful the legal, policy and delivery frameworks are in supporting integration; and what steps could be taken to improve integration.⁴

13. We concentrated on integration for the public transport *user*. The inquiry opened on 15 November 2012 with a “world café”⁵ public engagement event at the National Waterfront Museum, Swansea. The main issues raised by passengers related to the quality and coordination of public transport services, and a summary of the discussion is included at the end of this report.

14. We also hosted an online public transport user survey to provide further insight and to canvass as many views as possible. The key priorities identified in responses related to frequency and coordination of services. A summary of the findings is included in Annex C.⁶

15. We would like to thank all the people who contributed to our inquiry. In particular we are grateful to those people who participated in our event in Swansea, to the witnesses who battled through snow and floods to give evidence in the Senedd, and especially Jonathan Bray of the Passenger Transport Executive Group who travelled from Leeds.

16. We are also grateful to the three Members of the Committee who captured their public transport journeys on video.

⁴ The inquiry’s full terms of reference are included in Annex A

⁵ A world café is a discussion in an informal setting where participants share experiences and explore issues in small groups

⁶ The survey is summarised in Annex C

Overarching vision and strategy

“There is often a lack of vision in the transport industry in relation to integration”⁷

Welsh Government powers and leadership

17. One of the aims of the Welsh Government’s Wales Transport Strategy is to “move towards a fully integrated” public transport system “with availability and quality both enhanced.” In his written evidence to this inquiry, the then Minister for Local Government and Communities stated that:

“Whilst we are making good progress with our plans for an integrated transport system, more work needs to be done.”⁸

18. Stuart Cole, Professor Emeritus of Transport at the Wales Transport Research Centre, University of Glamorgan, argued that the Welsh Government’s current powers “severely [limit] its ability to balance investment between the best solutions to transport problems.”⁹

19. Highways and Transport issues are generally devolved to Wales, although the following key areas are not:

- specification of rail infrastructure outputs/improvements;
- provision and regulation of rail services;
- registration of local bus services;
- public service vehicle operator licensing.

20. Professor Cole told us:

“I would like to see the Traffic Commissioner’s responsibilities transferred to the Minister in Cardiff. I would want to see the regulation of the bus industry transferred to Cardiff...Those are two essential elements that have to be transferred before we can even think about a fully integrated public transport policy.”¹⁰

⁷ Professor Cole written evidence page 10

⁸ Welsh Government written evidence page 1

⁹ Professor Stuart Cole written evidence page 4

¹⁰ Record of Proceedings paragraph 42, 29 November 2012

21. The Confederation of Passenger Transport Wales also agreed that powers for bus regulation should be devolved.¹¹

22. Network Rail thought that the devolution of powers to the Welsh Ministers to establish rail infrastructure priorities for Wales would “potentially” help transport integration, although it warned that such a move would “mean that it would be up against things such as health and education.”¹²

23. Several witnesses, including Passenger Focus UK and Professor Cole praised Network Rail’s more devolved structure in Wales with the appointment of a Wales Route Manager, and how this was contributing to better partnership working to serve Welsh priorities.¹³

24. Network Rail also acknowledged that the new devolved structure was able to deliver more tailored services and respond better to stakeholder needs.¹⁴

25. Regarding the relationship between Network Rail and the Welsh Government, the Chartered Institute of Logistics and Transport (CILT) made the point that there are no data on how much spending in Wales comes from Network Rail, how much from the Welsh Government, how that compares with Network Rail’s investment in the rest of the UK, and therefore whether Wales receives a fair share of total rail investment. CILT therefore called for greater transparency in rail funding.¹⁵ We trust that this information will now become available following the establishment of the Network Rail Wales Route.

26. Professor Cole described the working relationship between Network Rail and the Welsh Government as good but he told us he wished to see the current relationship of agreement and partnership put on a statutory footing.¹⁶

27. The then Minister for Local Government and Communities stated in his written paper that:

¹¹ Record of Proceedings paragraph 201, 5 December 2012

¹² Record of Proceedings paragraphs 28-29, 10 January 2013

¹³ Record of Proceedings paragraphs 106, 134, 21 November 2012; Professor Stuart Cole written evidence page 13

¹⁴ Record of Proceedings paragraphs 8-10, 10 January 2013

¹⁵ Record of Proceedings paragraph 181, 16 January 2013

¹⁶ Record of Proceedings paragraphs 38 and 40, 29 November 2012

“Current [rail] legislation does not align with the effective delivery of my priorities.”¹⁷

28. He later told us that devolution of franchising powers and funding would be “significant” and “extremely helpful to us in shaping the future of integrated transport in Wales.”¹⁸

29. The then Minister’s paper also stated that “a lack of devolution and control - especially limited control over bus services” is a key barrier to integration.¹⁹ He later told us that devolution of the regulation of bus services in Wales would be “really significant in terms of the direction of authorities to deliver on Government priorities, with no question.”²⁰

30. We recognise the difficulties faced by the Welsh Government in seeking to integrate public transport when “integrated” powers have not been devolved. Weighing the evidence, we see there are three distinct areas where we believe devolution of powers to Wales would benefit a more integrated public transport system, and we have written to the Commission on Devolution in Wales to request that Part 2 of its review should consider those issues.

Recommendations 1, 2 and 3: the Welsh Government should:

Continue to lobby the UK Government for a statutory relationship between the Welsh Government and Network Rail, including devolution of powers to specify high level outputs for Welsh rail infrastructure, similar to the powers of the Scottish Government.

Continue to lobby the UK Government for an enhanced role in the rail franchising process as it affects Wales, particularly powers to specify franchise agreements that comprise predominantly Wales-only services, such as the current Wales and Borders Franchise.

Continue to lobby the UK Government for bus regulation and registration powers to be devolved to Wales, including making the Traffic Commissioner for Wales accountable to the Welsh Ministers.

¹⁷ Welsh Government written evidence page 10

¹⁸ Record of Proceedings paragraphs 196-198, 24 January 2013

¹⁹ Welsh Government written evidence page 2

²⁰ Record of Proceedings paragraph 198, 24 January 2013

31. Notwithstanding the need for further devolution of powers, we heard that providing a coherent vision for integrated public transport is not dependent on powers and policy structures alone: it also depends on institutional culture, skills and capacities. Sustrans Cymru stated:

“At the Welsh Government level, the skill set needed to take forward integrated transport is simply not there, and it is particularly true of rail. The capacity to do it simply is not there. At local authority level, there is a lot of experience in terms of buses, but there is very little experience in terms of active travel.”²¹

32. The Chartered Institute of Logistics and Transport (UK) Cymru also commented that:

“Ultimately it is the combination of skills, resources, collaboration, an effective strategy and appropriate regulatory framework which will improve integrated public transport provision.”²²

33. Witnesses also commented on the lack of strategic leadership by the Welsh Government. The Regional Transport Consortia suggested that Welsh Government ambition does not always translate effectively into delivery. TraCC, the Regional Transport Consortium for Mid Wales, highlighted the fact that current Regional Transport Plans pre-date the National Transport Plan, and suggested that “it has largely been left to [Regional Transport Consortia] and individual local authorities to make the links and seek better integration.”²³

34. We note the then Minister’s comments that preparations are underway for the next Regional Transport Planning period post-2015.²⁴ We also note that the National Transport Plan will be due for renewal in 2015. We believe this provides an opportunity to ensure a fully coordinated approach to public transport planning and delivery.

²¹ Record of Proceedings paragraph 230, 21 November 2012

²² CILT written evidence page 5

²³ TraCC written evidence page 7

²⁴ Record of Proceedings paragraph 186, 24 January 2013

Recommendations 4 and 5: the Welsh Government should:

Use all the powers at its disposal to drive public transport integration, and ensure staff at all levels of government have the skills and tools to deliver effective public transport policy.

Exploit the opportunity presented by the renewal of both the National and Regional Transport Plans to promote integrated public transport and ensure effective coordination and delivery of policy at national and regional levels.

Integration of policy and land use planning

“To achieve integrated transport you need integrated policy and integrated government”²⁵

35. While policy integration may be a touchstone of the Welsh Government’s approach to transport, several witnesses to our inquiry raised concerns about how effective the Welsh Government and local authorities are in practice in integrating public transport with land use policies and other policy areas, such as health, education and social services.

36. Sutrans Cymru told us:

“One of the silo barriers that we currently have is the journey to school. Education departments have no role in the journey to school; that is the responsibility of the transport department. That is true at the Welsh Government level and the local authority level. It is about cutting through those false barriers to try to deliver a win that will benefit everybody.”²⁶

37. TraCC raised concerns about the restructuring of key public services such as health provision without due consideration of accessibility of more centrally-located service centres. It stated that “redressing this issue should be a primary concern to all.”²⁷

38. Sustrans went on to tell us:

“Our experience is that public transport and integrated transport are often considered very late in the development process, both for residential and commercial developments. Active travel - walking and cycling - is usually not considered at all.”²⁸

39. Bus Users UK told us that large residential developments such as those in the Rhoose, Culverhouse Cross and Pontprennau districts of Cardiff were “examples of where big industrial or residential estates

²⁵ Sustrans - Record of Proceedings paragraph 211, 21 November 2012

²⁶ Record of Proceedings paragraph 215, 21 November 2012

²⁷ TraCC written evidence page 6

²⁸ Record of Proceedings paragraph 248, 21 November 2012

were built without a thought given to how people might commute” using public transport.²⁹

40. Professor Cole also raised concerns about new residential developments, such as the four proposed sites in the Cardiff draft Local Development Plan totalling some 20,000 houses.

41. The Chartered Institute for Logistics and Transport argued that regarding the planned new urban developments around Cardiff:

“In a couple of instances, disused rail lines [need] to be reopened and, in other instances, the introduction of dedicated bus ways. Those things need to be considered as part of land-use planning so that section 106 agreements can be used to get contributions out of developers to make sure that those transport schemes are put in place at the beginning, and not thought about afterwards when we have a lot of additional cars on the road.”³⁰

42. We were encouraged to hear from Network Rail that it has commenced a Long-Term Planning Process to:

“Start looking now at where future demand for the railway will come from, where commuting demand is, where new houses are being built under local authorities’ local development plans, where the jobs are going to be, such as at the Enterprise Zone in Cardiff, for instance, and where future demands are going to come from for between 10 years and 30 years from today.”³¹

43. Although we welcome the proactive approach taken in the planning process by bodies such as Network Rail, we fear that in the majority of cases the consideration of public transport, and sustainable transport more broadly, tends to be an afterthought, rather than integral, to proposed development, whether for housing, retail, schools or hospitals. It is vital that any new development is targeted around public transport hubs and that future transport interventions are directed to where they are most needed to reduce car dependence.

²⁹ Record of Proceedings paragraphs 22-23, 21 November 2012

³⁰ Record of Proceedings paragraph 234, 16 January 2013

³¹ Record of Proceedings paragraph 44, 10 January 2013

44. We note that Welsh planning policy - Wales Spatial Plan, Planning Policy Wales and Technical Advice Note 18 - already makes reference to the need to consider transport in general and integrated public transport in particular. We are therefore concerned by the extent of the evidence suggesting that public transport provision in new developments is often inadequate.

45. We note the then Minister's comment that he wants to see planning authorities and developers work more closely together, but his paper did not indicate how the consideration of public transport issues in the planning process could be improved.³²

Recommendations 6, 7, 8 and 9: the Welsh Government should:

Ensure that changes to the planning system to be introduced through the forthcoming Planning Reform Bill include a strengthened requirement for all major development schemes to (a) include adequate public transport provision and actively promote sustainable, integrated public transport or else they will be refused planning permission; and (b) consult transport planning bodies at an early stage, including those schemes funded by the Welsh Government.

Ensure that walking and cycling links to public transport services and infrastructure are prioritised in delivery of the Active Travel (Wales) Bill, and take steps through wider bus and rail policies to enhance walking and cycling infrastructure and provision for bikes on buses and trains.

Establish appropriate delivery mechanisms to mainstream transport planning across the work of all Welsh Government departments, particularly in relation to access to health, education and social services.

Ensure that the integrated transport task forces established in north Wales and south east Wales lead to clear, costed delivery plans that take account of wider policy areas such as health and land use planning.

³² Welsh Government written evidence page 13

Collaboration between bus operators

46. We were interested in whether current UK competition rules were preventing integration between transport operators or whether there is simply a reluctance among operators to co-operate with one another. There appeared to be some strong opinions on these issues.

47. First Group did not believe that competition prevented integration or people working together.³³

48. In contrast, the Association of Transport Coordinating Officers (ATCO) suggested that UK competition rules were still seen as a “key deterrent” to operators coordinating timetables and ticketing because of a fear of fines from the Competition Commission. It argued that the ideology had led to “bus wars in Britain’s busiest cities at the expense of passengers’ clear preference for integrated public transport.”³⁴

49. ATCO later told us that:

“Operators are not really allowed to talk to one another on multimodal ticketing. We have a situation in our area where two operators run the same route but will not accept each other’s tickets.”³⁵

50. Professor Cole stated that:

“There is no requirement on bus companies to integrate tickets and timetables between themselves or with other operators despite their being members of the same overall group.”³⁶

51. Lloyds Coaches, a family owned company based in Machynlleth, told us:

“Operators...are protective of their own operational territories, concerned by possible revenue abstraction especially in relation to commercially operated services/journeys and are unable to see that joined up thinking in terms of coordination between modes may bring about higher revenue returns.”³⁷

³³ Record of Proceedings paragraph 212, 5 December 2012

³⁴ ATCO written evidence paragraph 5.3

³⁵ Record of Proceedings paragraph 112, 29 November 2012

³⁶ Professor Cole written evidence page 13

³⁷ Lloyds Coaches written evidence page 1

52. As to how to improve collaboration between operators, opinion varied widely. The Chartered Institute of Logistics and Transport (CILT) told us that there was:

“A diverse point of view within the Institute. Those of our members who work within the bus industry want the lightest possible touch. I can point out some deficiencies in that view in that bus provision solely open to competition leaves a situation where bus companies maximise profits; they cherry-pick routes to do that and they offer a limited service.”³⁸

53. Yet CILT went on to say that having a network that fully met passenger needs:

“Is not going to be done under competition; you must have a voluntary arrangement under the quality partnerships or some type of contract. There is no evidence of one working yet. Indeed, the way of giving you assurance of having a network available at the times that you want it is to go for a franchising system, as they have done in London.”

Partnerships, contracts and franchising

54. Under the Transport Act 2000 (as amended by the Local Transport Act 2008) there are four approaches to the delivery of bus services, which are intended to improve quality without breaching competition rules: voluntary partnership agreements, qualifying agreements, quality partnership schemes³⁹ and quality contracts⁴⁰. No quality contracts have been implemented in the UK to date.

55. Evidence submitted by First Group argued vehemently against quality contracts. It suggested they would have “an immediate and serious destabilisation effect on local bus service provision”, remove the expertise and knowledge of bus operators, and that the cost and risk would be borne by local council tax payers and local businesses.⁴¹

56. SWWITCH, the South West Wales Integrated Transport Consortium, contended that quality contracts and partnerships are expensive and

³⁸ Record of Proceedings paragraph 212, 16 January 2013

³⁹ Where one or more local authorities sets out standards for bus service operators

⁴⁰ Where one or more local authority determines which services should be provided in that area

⁴¹ First Group written evidence page 4

time consuming to implement.⁴² The Association of Transport Coordinating Officers and the Confederation of Passenger Transport Cymru were also against quality bus contracts and preferred a voluntary partnership approach.⁴³ Lloyds Coaches stated that quality contracts should be a “last resort” when all other options had been exhausted.⁴⁴

57. Written evidence from the Passenger Transport Executive Group⁴⁵ stated that:

“There are considerable ‘first mover disadvantages’ on quality contracts. This often leads to politicians and transport planners seeking to achieve the ends of a QC whilst not being prepared to adopt the means to those ends (the QC process itself). That is not to say that bus services can’t be improved without a QC – they can. However, if all the benefits of a QC are sought across a large area (including simple and fully integrated ticketing, service stability, integration across the modes) then you need a Quality Contract. Twenty five years of bus deregulation’s failure to achieve these basic objectives prove the point.”⁴⁶

58. TraCC suggested that quality partnerships and contracts can support better integration of local and longer distance bus services although “integration with rail services will remain outside of their scope.”⁴⁷

59. The Passenger Transport Executive Group’s written evidence suggested that a quality contract approach would be beneficial in integrating bus and rail services, with Cardiff Valleys electrification identified as a particular opportunity.⁴⁸ PTEG later told us:

“Not to take the opportunity [of Cardiff and Valleys electrification] to link in bus services and to co-ordinate fares at

⁴² SWITCH written evidence pages 3-4

⁴³ ATCO written evidence paragraph 7.3; CPT written evidence page 3

⁴⁴ Lloyds Coaches written evidence page 4

⁴⁵ The body that brings together and promotes the interests of the six Passenger Transport Executives in England

⁴⁶ PTEG paragraph 4.12

⁴⁷ TraCC written evidence page 8

⁴⁸ PTEG written evidence paragraph 4.14

the same time would, I would suggest, be a major missed opportunity.”⁴⁹

60. The Passenger Transport Executive Group also suggested that quality contracts could be more cost-effective, especially in rural areas where public transport services are heavily subsidised, often on a route by route basis.

61. Passenger Focus UK told us:

“Our view is that [quality contracts] can deliver all the things that passengers want, but bus operators, of course, are opposed to them, because they take away their commercial freedom, the entrepreneurship and the innovation. London has a similar framework, and, although so much money goes into London, it gets things right on the integration of transport, with simple ticketing, great information at bus stops, a greater frequency of service and the things that are really important to passengers. So, yes, that can help, but we do not yet have the evidence to say that it can, even from a passenger perspective.”⁵⁰

62. Professor Cole suggested that quality partnerships and quality contracts could assist integration and improvements in vehicle standards, but he considered them “an interim measure” and that neither option “achieves the full benefits of a franchising model for all routes.”⁵¹ He later told us:

“Competition in the market, on its own, does not work properly and it costs more for public services. So, the middle ground is to get the two to work together in partnership. If that does not work, we must move on to franchising.”⁵²

63. Professor Cole advocated a full bus franchising approach similar to rail franchising where franchises would be issued by the Welsh Government or a regional integrated transport body as providing “the

⁴⁹ Record of Proceedings paragraph 65, 7 February 2013

⁵⁰ Record of Proceedings paragraph 156, 21 November 2012

⁵¹ Professor Stuart Cole written evidence pages 12-14 and 19

⁵² Record of Proceedings paragraph 35, 29 November 2012

best of both worlds: public control of service specification; and private operation of the services” as well as providing stability for the user.⁵³

64. In Professor Cole’s opinion, because quality bus partnerships and quality bus contracts can only be made by county councils in Wales and not by the Welsh Government or Regional Transport Consortia, this was an argument for the devolution of powers over bus regulation from Westminster.⁵⁴

65. The Welsh Government’s written paper stated that the then Minister would like to see more quality partnership schemes in place to shape the provision of bus services but that he would consider supporting quality contract schemes where there was “clear evidence” that a partnership approach was not delivering the improvements required.⁵⁵

66. We believe that the current de-regulated bus market can be unsuitable for meeting the social and environmental objectives of public transport services, and particularly for serving areas and routes that are not commercially viable. We understand operators’ concerns about quality contracts, but we too are concerned that their preferred voluntary partnership approach has not been effective to date and will not work sufficiently quickly or effectively for passengers on the ground.

67. In our view, greater cooperation between operators is essential to achieving transport integration. This is likely to be even more of a priority given the announcement by the then Minister for Local Government and Communities that his review of bus funding will result in a reduction of around 25 per cent compared with the previous year.⁵⁶ Witnesses told us that this planned reduction in funding will result in the loss of some marginal bus services⁵⁷ and “substantial upheaval in terms of fare increases, deregistration by bus operators and fewer council-supported services.”⁵⁸

68. As one respondent to our public transport user survey commented:

⁵³ Record of Proceedings paragraph 47, 29 November 2012

⁵⁴ Professor Cole written evidence page 11

⁵⁵ Welsh Government written evidence page 7

⁵⁶ Letter from the Minister to the Chair dated 13 November 2012

⁵⁷ Chartered Institute of Logistics and Transport - Record of Proceedings paragraph 220, 16 January 2013

⁵⁸ Sewta written evidence paragraph 4.13

“It’s all getting too difficult. Lots of people...have given up trying to go anywhere on the buses. The elderly people in particular are suffering because of this. It is leading to isolation and depression for them (and me). We must be able to get to hospitals but it has become impossible. Please help.”

69. We welcome the intention behind the Welsh Government’s new policy to make bus operator funding conditional on delivery of “quality outcomes” such as multi-operator ticketing and timetable coordination. However, we share the concerns of some witnesses that the level of funding may be insufficient to fully deliver these benefits and may adversely impact on some services.

70. We also recognise the difficulties caused by competition legislation, although we are not clear whether the provisions of the Transport Act 2000 in relation to the use of quality contracts schemes have been fully used in Wales.

Recommendations 10 and 11: the Welsh Government should:

Establish whether effective use is being made in Wales of provisions under the Transport Act 2000 (as amended) to improve bus services, and promote their implementation to facilitate greater cooperation and coordination of services.

Move towards greater regulation of the bus market in Wales, including consideration of a franchise approach to bus route/network tendering based on supply side competition.

Coordination of transport timetables and information

“Public transport integration utterly relies on timetable coordination to function”⁵⁹

71. According to the Association of Transport Coordinating Officers, public transport information in Wales is “inconsistent and often inadequate.”⁶⁰

72. We heard during our inquiry of the first-class service provided by TravelineCymru for planning journeys beforehand via the telephone, internet or mobile apps, although it was pointed out that information on community transport and other demand-responsive services is not yet easily accessible. We heard suggestions that TravelineCymru could be further improved if it were developed into a single national transport information service – or “one-stop-shop.”⁶¹

73. There was less praise for travel information “on the go”, however. According to Bus Users UK, “the biggest weakness in the provision of information to the travelling public is the lack of standardisation.”⁶² The Community Transport Association said:

“Ceredigion does not seem to have any timetables that we can fathom, while Pembrokeshire is amazing.”⁶³

74. We heard several complaints that bus timetables are frequently changed and not updated, which causes great frustration and inconvenience for passengers. The Association of Transport Coordinating Officers therefore suggested that bus timetable changes should be limited to twice a year.⁶⁴ Bus Users UK told us in supplementary evidence that 12 local authorities in Wales do not even publish current bus timetables.⁶⁵

75. We were disappointed to hear that provisions contained in the Transport Act 2000 regarding the provision of bus information do not

⁵⁹ ATCO written evidence paragraph 5.1

⁶⁰ ATCO written evidence paragraph 6.3

⁶¹ Record of Proceedings paragraphs 77 and 86, 24 January 2013

⁶² Record of Proceedings paragraph 33, 21 November 2012

⁶³ Record of Proceedings paragraph 20, 5 December 2012

⁶⁴ Record of Proceedings paragraph 128, 29 November 2012

⁶⁵ Bus Users UK Supplementary evidence

appear to be implemented in Wales. Sewta, the South East Wales Transport Alliance, stated in its written evidence that to its knowledge no bus information schemes are in place under the Act in Wales.⁶⁶

76. Bus Users UK argued for real-time information to be displayed on more bus stops, especially in rural areas, although it warned that the installation of that technology “is generally put under a capital heading, but there may not necessarily be revenue funding to maintain and update the information.”⁶⁷

77. Passenger Focus UK also emphasised the need for real-time information provision at all Welsh rail stations. We were therefore encouraged to hear from Network Rail that through its modernisation plan real progress is being made to provide up-to-date, live information:

“Every station bar a few... on the central Wales line, which receives four trains in each direction a day, [will] have those electronic screens.”⁶⁸

78. Passenger Focus UK raised many concerns regarding connections from main line services into rural services. We were told that “timetables are perhaps not co-ordinated and passengers may face a 58-minute or 59-minute delay in connection.”

79. On the other hand, it was interesting to note from Railfuture’s written evidence that the current regulatory regime - where financial penalties are imposed on train operating companies when their trains run late - actually deter onward connections being held when services are delayed.⁶⁹

80. Passenger Focus highlighted a particular problem in Wales of bus timetables and rail timetables “never being very well co-ordinated.”⁷⁰ The Chartered Institute of Logistics and Transport commented that coordination of timetables is less important where routes operate to a relatively high frequency (e.g. every 10 to 15 minutes) but with less

⁶⁶ Sewta written evidence page 19

⁶⁷ Record of Proceedings paragraph 43, 21 November 2012

⁶⁸ Record of Proceedings paragraph 80, 10 January 2013

⁶⁹ Railfuture written evidence paragraph 4.2.2.8

⁷⁰ Record of Proceedings paragraphs 93-94, 21 November 2012

frequent services there should be “appropriate, guaranteed connections.”⁷¹

81. The Association of Transport Coordinating Officers suggested that bus-rail integration was particularly difficult in rural areas where bus services were infrequent, but that buses should be held to meet delayed trains. Lloyds Coaches was also in favour of “buffer connection times” to avoid passengers being stranded between services.⁷²

82. We heard examples of bus service information being displayed in rail stations (such as Swansea) but Network Rail told us that there did not appear to be much discussion with bus operators or local authorities about providing train information at bus stations.⁷³

83. Arriva Trains Wales told us that rail information had been installed at Bridgend bus station, however, which proves that collaboration is possible “if there is a will, and if we can establish good partnership working and the technical means of doing it.”⁷⁴

84. Sustrans Cymru told us that:

“Enabling individual users to achieve integrated journeys where there are no excessive delays, where they can transfer easily between different modes, including active travel, is important to them.”⁷⁵

85. In contrast, First Group told us that in relation to coordinating bus and rail services and timetables:

“Trying to link them does not work. They are two different markets. Yes, there is a benefit in providing integration and opportunity to travel, but linking the timetables together does not make a great deal of sense.”⁷⁶

86. First Group appeared to be a lone voice. The Chartered Institute for Logistics and Transport said it “cannot understand anyone taking

⁷¹ CILT written evidence page 3

⁷² Lloyds Coaches written evidence page 2

⁷³ Record of Proceedings paragraph 88, 10 January 2013

⁷⁴ Record of Proceedings paragraph 87, 16 January 2013

⁷⁵ Record of Proceedings paragraphs 208, 21 November 2012

⁷⁶ Record of Proceedings paragraph 168, 5 December 2012

the view that you would not want to integrate bus and rail services, particularly on long-distance networks in Wales.”⁷⁷

87. First Group’s comment jarred with views expressed at our world café stakeholder event in Swansea. It also cut across the good work by Arriva Trains Wales in trying to link bus services with rail services into Bangor station, although ATW admitted that this was still “a mountain that I have to climb.”⁷⁸

Recommendations 12, 13 and 14: the Welsh Government should:

Ensure that new bus funding arrangements and Regional Bus and Community Transport Network Strategies prioritise service coordination and high quality information, including quality standards and restrictions on the frequency of timetable changes.

Establish whether the duty to develop bus information schemes under the Transport Act 2000 is being met by Welsh local authorities and provide support to ensure compliance.

Press all transport operators to work together and with relevant stakeholders to implement best practice in coordinating timetables, connecting services and publishing real time information to provide seamless links between bus, rail and community transport networks.

⁷⁷ Record of Proceedings paragraph 228, 16 January 2013

⁷⁸ Record of Proceedings paragraph 34, 16 January 2013

Integrated fares and ticketing

“The concept of the end-to-end journey needs to be hard-wired into transport policy and planning”⁷⁹

88. Passenger Focus referred to the current complexity, confusion and mistrust over rail fare structures and ticketing among public transport users. We were given the clear message that operators needed to simplify and integrate their different fare and ticket systems.⁸⁰

89. We were therefore encouraged to hear from Arriva Trains Wales that it was working to “even out” pricing structures and to “make it more equitable across the network.”⁸¹ We were also pleased to hear that Arriva Trains Wales is working to ensure that passengers will be able to travel from any rail station in the UK to the Maes at this summer’s Eisteddfod in Denbigh using a combined ticket.⁸²

90. Many witnesses highlighted the benefits of integrated ticketing. The Association of Transport Coordinating Officers stated that an estimated third of the increased use of public transport in London in 1999-00 could be attributed to the Oyster Card and other ticketing simplifications.⁸³ The Passenger Transport Executive Group also told us that wherever simpler ticketing has been introduced there has been an “uplift” in passenger use.⁸⁴

91. We heard from Arriva Trains Wales that it has plans to trial some mobile ticketing in September, but this will be limited by the lack of broadband and mobile signals in some areas. We also heard that ATW was aiming to “exceed the Oyster-card-type technology.”⁸⁵ This is important because, as we were told by the Regional Transport Consortia, “it may well be that, as technology moves on, having a smartcard is not the approach to take.”⁸⁶

⁷⁹ Record of Proceedings paragraph 260, 21 November 2012

⁸⁰ Record of Proceedings paragraphs 110-117, 21 November 2012

⁸¹ Record of Proceedings paragraph 118, 16 January 2013

⁸² Record of Proceedings paragraph 28, 16 January 2013

⁸³ ATCO written evidence paragraph 3.2

⁸⁴ Record of Proceedings paragraph 85, 4 February 2013

⁸⁵ Record of Proceedings paragraphs 77 and 104, 16 January 2013

⁸⁶ Record of Proceedings paragraph 157, 24 January 2013

92. The Passenger Transport Executive Group echoed this view:

“Technology can do anything... By the time we will have cracked smartcards, things will probably have moved on.”⁸⁷

93. The Welsh Government’s National Transport Plan includes a commitment to introduce an All Wales Transport Entitlement Card by 2014. The scheme (“GoCymru”) is being piloted in Newport and Bangor and the Welsh Government is investing approximately £8 million over three years.⁸⁸

94. During our inquiry, media reports indicated that the Wales Transport Entitlement Card will be introduced for bus travel by 2014 but not extended to rail travel until the new Wales and Borders Franchise is awarded in 2018. The then Minister clarified in a letter to the Chair, dated 5 February 2013, that he would announce “in the next few months” a timetable for extending the Card to rail companies.⁸⁹

95. Professor Cole thought that:

“The Welsh Government is rightly testing the All Wales Public Transport Entitlement Card....Its extension nationally for all bus and rail journeys...must be a priority.”⁹⁰

96. The Association of Transport Coordinating Officers (ATCO) pointed out that the Card is currently being developed as an e-purse (allowing cashless travel) as opposed to a fully integrated ticket. Although in oral evidence ATCO told us that integrated ticketing was difficult under current legislation, it suggested that membership of an integrated ticketing scheme could be made a condition of payments under the Regional Transport Services Grant (the successor to Local Transport Services Grant and the Bus Services Operating Grant)⁹¹ and a condition of the next Wales rail franchise.⁹²

⁸⁷ Record of Proceedings paragraph 81, 7 February 2013

⁸⁸ Welsh Government written evidence page 4

⁸⁹ Letter from the Minister for Local Government and Communities to the Chair, 5 February 2013

⁹⁰ Professor Stuart Cole written evidence page 7

⁹¹ The new Regional Transport Services Grant will replace the Local Transport Services Grant and the Bus Service Operator’s Grant and will be managed from 1 April 2013 by the Regional Transport Consortia, with a transitional year until April 2014

⁹² ATCO written evidence paragraphs 3.14, 3.16 and 3.18

97. We asked the then Minister for Local Government and Communities to clarify the process for moving from the proposed e-purse to fully integrated ticketing. He told us that he was:

“Not yet convinced that a route-based system is better than a finance-based system. I am not clear on what the benefits would be for Wales, given the diverse numbers of transport operators that we have.”⁹³

98. In our view, passengers should be able to make end-to-end journeys across all operators and all transport modes using one ticket, based on a simple and transparent fare structure.

Recommendation 15: the Welsh Government should:

Develop a fully integrated public transport ticketing scheme for Wales across all transport networks as a priority alongside delivery of the GoCymru e-purse.

⁹³ Record of Proceedings paragraph 236, 24 January 2013

Quality transport infrastructure and interchanges

Interchanges

99. Many witnesses to our inquiry commented on the need for more effective and efficient interchange between buses and trains, not only in terms of coordinating timetables and services but also in terms of physical infrastructure and location.

100. Professor Cole identified the following priorities for improvements: bus/rail interchange information including clear signage, particularly where modes are not physically adjacent; on-platform information on bus, taxi and walking routes to city centres; and connecting bus/rail services.

101. The Association of Transport Coordinating Officers highlighted the effect of the so-called “interchange penalty”, where the inconvenience of changing services or modes of transport works against the modal shift from private to public transport. High quality and safe interchange facilities were seen to be key to overcoming this.⁹⁴

102. Passenger Focus UK thought that bus and rail stations needed to be brought together. The organisation was also supportive of parkways as transport hubs.⁹⁵

103. Network Rail thought that the Regional Transport Consortia could do more to encourage and promote the development of hubs with high-quality long-distance bus links.⁹⁶ However, where stations are not physically adjacent (such as Swansea bus and rail stations) Network Rail stated it was important to work with local authorities to make the experience of transferring from train to bus as smooth as possible and ensure “that the bus stops outside the station are easy to access - they are right outside the door.”⁹⁷ However, Network Rail commented that:

⁹⁴ ATCO written evidence page 5

⁹⁵ Record of Proceedings paragraphs 164-166, 21 November 2012

⁹⁶ Record of Proceedings paragraph 76, 10 January 2013

⁹⁷ Record of Proceedings paragraph 60, 10 January 2013

“There is no imperative for a private bus company to provide a bus to go to a railway station, so we need a holistic view as to how we get an integrated transport network.”⁹⁸

104. Passenger Focus emphasised the importance of providing car parking facilities at rail stations.⁹⁹ The Chartered Institute for Logistics and Transport thought that:

“The biggest thing that can be done to exploit electrification is to increase the number of park-and-ride facilities, particularly on the outskirts of our big cities such as Cardiff and Swansea.”¹⁰⁰

105. On the other hand, Sustrans suggested that because car parks are expensive and fill up fast, providing better cycling and walking routes to rail and bus stations might improve journey time reliability.¹⁰¹ Sustrans also stressed the current limited provision for carrying cycles on trains and buses.

106. Arriva Trains Wales made the point that walking and cycling should feature in any future public transport integration strategy for Wales or Welsh regions.¹⁰²

Recommendation 16: the Welsh Government should:

Identify best practice in developing public transport interchanges and facilities, and work with stakeholders to develop and implement standards for the provision of such infrastructure.

Quality and accessibility of services

107. The McNulty Report, commissioned by the UK Government and published in May 2011, concluded that rail in Britain needs to save approximately £1 billion by 2018-19. It recommended a series of changes within the rail industry, including an increase in Driver Only Operation trains and reduced staffing at stations. Passenger Focus UK told us:

“Staff visibility is incredibly important to passengers. This issue comes across every time in our research, regardless of the

⁹⁸ Record of Proceedings paragraph 66, 10 January 2013

⁹⁹ Record of Proceedings paragraph 166, 21 November 2012

¹⁰⁰ Record of Proceedings paragraph 232, 16 January 2013

¹⁰¹ Record of Proceedings paragraph 238, 21 November 2012

¹⁰² ATW written evidence page 4

factor we are studying. It improves people's sense of personal security at stations and on trains. It also improves the availability of information and means that passengers who need it can get help with getting on the train, buying a ticket or whatever."¹⁰³

108. We were therefore encouraged to hear from Arriva Trains Wales that:

"If it is to do with closing booking offices, we have no particular plans to do anything like that, and we believe that the staffing levels that we have now are fit for purpose, and they are reviewed at least every year, depending on demand and growth in patronage."¹⁰⁴

109. Arriva Trains Wales stated that integration tends in Wales to consist of projects for improving access to trains but "does not follow any particular strategy or policy on integration."¹⁰⁵

110. Accessibility of services was another significant area of concern and complaint among witnesses to this inquiry, and it was an important element of the world café discussions we held in Swansea. Annex B contains a catalogue of problems faced by disabled passengers in travelling on bus and train services in Wales.

111. In oral evidence, we also heard from the Community Transport Association about examples of:

"Taking people to a rail station where the northbound platform might be accessible and the southbound platform might not. It is difficult for service users to get absolute information as to the accessibility of the various legs of a journey."¹⁰⁶

112. We were very concerned to hear about these experiences given that two years ago, the Third Assembly's Equality of Opportunity Committee published a comprehensive report on the impact of Welsh

¹⁰³ Record of Proceedings paragraph 119, 21 November 2012

¹⁰⁴ Record of Proceedings paragraph 138, 16 January 2013

¹⁰⁵ ATW written evidence page 3

¹⁰⁶ Record of Proceedings paragraph 24, 5 December 2012

Government policy on the accessibility of transport services for disabled people in Wales.¹⁰⁷

Recommendation 17: the Welsh Government should:

Revisit the ten recommendations made by the Equality of Opportunity Committee on the accessibility of transport services for disabled people, and update us on progress made in implementing those recommendations.

Opportunities presented by the Wales and Borders Franchise

113. The current Wales and Borders Franchise expires in 2018. Arriva Trains Wales told us that the current franchise has:

“No specific contractual obligations for us to provide specific infrastructure or facilities in connection with integrated services apart from an obligation to work with local bus operators on through ticketing schemes.”¹⁰⁸

114. In oral evidence Passenger Focus identified provision of better information, marketing, clear timetabling and the availability of multi-modal tickets as important issues to be addressed in the new franchise.¹⁰⁹

115. Professor Cole anticipated that the new franchise could provide an opportunity to integrate rail with the long-distance bus network, specifically TrawsCymru.¹¹⁰ This was also the personal view of one of the Regional Transport Consortia representatives.¹¹¹

116. The Chartered Institute for Logistics and Transport warned that:

“We might want a gold-plated railway service, but if it will not generate a feasible financial model for the operator of the franchise, maybe we need to take that into account and come up with a realistic objective that we might want to achieve.”¹¹²

¹⁰⁷ Inquiry into the impact of Welsh Government policy on the accessibility of transport services for disabled people in Wales, Equality of Opportunity Committee, February 2011

¹⁰⁸ ATW written evidence page 1

¹⁰⁹ Record of Proceedings paragraph 131, 21 November 2012

¹¹⁰ Record of Proceedings paragraph 76, 29 November 2012

¹¹¹ Record of Proceedings paragraph 71, 24 January 2013

¹¹² Record of Proceedings paragraph 236, 16 January 2013

117. We believe that the new Wales and Borders Franchise provides the opportunity to achieve Welsh aspirations regarding the quality, accessibility and connectivity of public transport provision from 2018 onwards. The Welsh Government told us that it is already starting to establish priorities for the new franchise and that a public consultation on policy objectives for rail is planned for early 2013.¹¹³

Recommendations 18 and 19: the Welsh Government should:

Develop a thorough understanding of passengers' needs to inform Network Rail's Long-Term Planning Process and the new Wales and Borders Rail Franchise.

Ensure inter-modal integration is a key component of the new Wales and Borders Franchise, which should encompass integrated information, ticketing and timetabling.

¹¹³ Welsh Government written evidence page 11

Community transport and demand-responsive public transport

“Community transport is seen as an add-on or an afterthought, quite often, rather than being a valid part of integrated transport policy.”¹¹⁴

118. Some of the most tailored and innovative public transport services that we came across in this inquiry were the Bwcabus network in Carmarthenshire and Ceredigion, and community transport services. Bwcabus is a commercial demand-response bus network; community transport is a not-for-profit service run in rural and urban areas by the community for the community and is often provided by volunteers.

119. We heard from Professor Cole, the architect of the Bwcabus concept, that demand for the service has increased by 40 per cent in the first rural areas that it served (Carmarthen, Newcastle Emlyn and Aberteifi) and that the service has been extended to other areas.¹¹⁵

120. The Chartered Institute for Logistics and Transport called for the Bwcabus scheme to be “rolled out into other parts of Wales, to make sure that people living in rural areas in mid and north Wales have adequate provision of integrated transport.”¹¹⁶

Recommendation 20: the Welsh Government should:

Roll out the Bwcabus model to rural areas in Wales not currently connected to the main bus network.

121. The Chartered Institute of Logistics and Transport commented that the integration of community transport with the wider transport network “is patchy at best at the moment.”¹¹⁷ On the other hand, we also heard that commercial bus operators were very positive about the important contribution that community transport can make in connecting outlying communities with the wider bus network.¹¹⁸

122. From the evidence we heard from individual community transport operations, we believe that community transport is crucial in areas of

¹¹⁴ Record of Proceedings paragraph 38, 5 December 2012

¹¹⁵ Record of Proceedings paragraph 66, 29 November 2012

¹¹⁶ Record of Proceedings paragraph 188, 16 January 2013

¹¹⁷ Record of Proceedings paragraph 208, 16 January 2013

¹¹⁸ Record of Proceedings paragraph 258, 5 December 2012

Wales where there is market failure of provision from commercial operators or for passengers such as the elderly and disabled who find it difficult to use conventional transport services and need door-to-door access. We were also struck by the point made by the Community Transport Association when it referred to “the demographic time bomb”:

“Given the projected growth, particularly in the oldest-old, as they are called - people aged over 80 - over the next 20 years, we feel that transport policy needs to be taking their needs into account far more.”¹¹⁹

123. Written evidence from the Community Transport Association (CTA) expressed concern that the Welsh Government’s proposed Regional Bus and Community Transport Network Strategy will be devolved to the Regional Transport Consortia without national standards for community transport. The CTA wished to see an overarching all-Wales strategy that sets a minimum level and quality of community transport across Wales, with regional strategies developed below this.¹²⁰

Recommendations 21 and 22: the Welsh Government should:

Work with relevant stakeholders to deliver consistent and high quality community transport provision across all the Regional Transport Consortia.

Increase support for innovative community transport schemes and promote good practice to maximise the opportunities offered by the sector, particularly to provide services where there is commercial market failure.

124. We were concerned to hear from the Community Transport Association that the community transport concessionary fares initiative, which was a pilot scheme set up by the Welsh Government in 2005-06 to enable elderly and severely disabled people to use their bus pass within 15 pilot community transport schemes across Wales, has been continued on a month-by-month basis since September

¹¹⁹ Record of Proceedings paragraph 38, 5 December 2012

¹²⁰ Record of Proceedings paragraph 69, 5 December 2012

2011. This is causing severe difficulties for community transport operators, who have had to put drivers on notice of redundancy.¹²¹

125. It was also significant to be told:

“The qualitative evidence that we have gathered over the years shows quite clearly that the use of concessionary fares on community transport enables people to retain their independence for longer. There are people who are completely housebound, for instance, who would not be able to get out without it. It contributes significantly to improving their quality of life.”¹²²

126. Ten per cent of the new Regional Transport Services Grant will be ring-fenced for community transport. SWITCH called for longer-term (at least three-year) revenue support for community - and bus - transport services.¹²³ TAITH, the North Wales Regional Transport Consortium, also told us that the key challenge over the next 12 to 18 months was:

“To find a way of supporting [community transport] over a period of time to enable them to grow and develop the capacity to be able to offer the seamless service that the health sector, for example, will expect to have, if it is going to commission significant services from the community transport sector.”¹²⁴

127. The then Minister made it clear to us that he could not afford any further investment in community transport.¹²⁵ We note the then Minister’s comment about the scale of funding, but we believe that security of funding is a different issue.

Recommendation 23: The Welsh Government should:

Provide greater certainty over longer-term funding to enable community transport operators to plan and invest in the future.

128. Regarding the procurement of transport services, the Community Transport Association told us that commissioning authorities are often unwilling to consider alternative transport mixes such as community

¹²¹ Record of Proceedings paragraph 55, 5 December 2012

¹²² Record of Proceedings paragraph 67, 5 December 2012

¹²³ SWITCH written evidence page 1

¹²⁴ Record of Proceedings paragraph 129, 24 January 2013

¹²⁵ Record of Proceedings paragraph 289, 24 January 2013

transport. We were told by one operator based in Mountain Ash, who operated throughout south east Wales:

“We do not have a good relationship with commercial operators. There is a feeling that community transport is second class - they do not see us as part of their mainstream operation. In rural areas it is a little different, because community transport is needed more frequently to provide bus services that the commercial operators do not, but because we are in an area where there are commercial bus operators, they tend to see us as competitors and second class.”¹²⁶

129. In contrast, Gwynedd had good examples of community and commercial bus operators working together. In the Community Transport Association’s view community transport could help address network gaps and poor access to key settlements. It wanted to see a different approach to tendering that could favour local transport operators with a proven record of community engagement by requiring value, health and social impact and equality of service to be demonstrated within a tender bid.

130. In paragraph 66 above we have expressed the view that lowest cost rather than best value may not contribute to the integration of commercial bus services, although in the context of a likely 25 per cent reduction in bus funding, this may increasingly be the favoured approach.

Recommendation 24: the Welsh Government should:

Identify and resolve inconsistencies between local authorities on whether they not only allow, but also encourage, community transport operators to tender for commercial bus services.

¹²⁶ Record of Proceedings paragraph 30, 5 December 2012

Integrated structures, planning and delivery

“What we are looking for...is a body with responsibility for co-ordinating transport across a region or an area, bringing together all those relevant parties”¹²⁷

Regional Transport Consortia

131. The *Regional Transport Planning (Wales) Order 2006* permitted local authorities in Wales to make transport plans on a regional rather than local basis. Wales currently has four Regional Transport Plans prepared under the Order.

132. Sustrans suggested that while the establishment of the Regional Transport Consortia has improved vertical integration of national and local transport priorities and delivery, horizontal integration between transport providers and between different policy agendas still “requires considerable work.”¹²⁸

133. Bus Users UK Cymru told us that the Regional Transport Consortia model does work, although some consortia are more mature than others.¹²⁹

134. Lloyds Coaches suggested that while some of the consortia work well, local authority and consortia staff do not always have the required “skill sets, drive and enthusiasm” owing to budget pressures and amalgamation of departments.¹³⁰ The Chartered Institute of Logistics and Transport also commented that the Regional Transport Consortia were underfunded and lacked expertise.¹³¹

135. The Welsh Local Government Association’s (WLGA’s) evidence suggested that the current governance arrangements for the Regional Transport Consortia were a “limiting factor” as was the fact they relied heavily on local authority staff. However, the WLGA perceived that new collaborative arrangements arising from the bus review and the

¹²⁷ Record of Proceedings paragraph 67, 10 January 2013

¹²⁸ Sustrans written evidence paragraph 16

¹²⁹ Record of Proceedings paragraph 68, 21 November 2012

¹³⁰ Lloyds Coaches written evidence page 3

¹³¹ Record of Proceedings paragraph 171, 16 January 2013

Simpson Compact could see the consortia grow and take on a greater role.¹³²

136. TraCC acknowledged there was “some variation across the four ‘Regions’ in terms of resources and capacity.”¹³³ Sewta argued that “additional powers and resources would be needed at the regional level to deliver a more ambitious integrated transport programme.”¹³⁴

137. Arriva Trains stated it was in favour of a stronger and more strategic approach to transport planning, with a “drive” to deliver integration, both at a national and regional level.¹³⁵

138. Professor Cole suggested there were two prerequisites for achieving integrated public transport: a single policy and budgetary authority at the strategic national and regional level, and coordinating bodies at operational level to achieve seamless interchange between and within transport modes. Professor Cole regretted that Sewta had not yet been converted into a Joint Transport Authority for south east Wales.¹³⁶ He told us that he would like to see the creation of four statutory Joint Transport Authorities in the four regional consortia areas of Wales, using the provisions of the Transport (Wales) Act 2006 (“the 2006 Act”).¹³⁷

Joint Transport Authorities

139. The Welsh Government has powers under the Act to establish Joint Transport Authorities to deliver local authority transport functions at a regional level. The then Minister for Local Government and Communities had stated:

“Although it would be premature to move to establishing a statutory Passenger Transport Executive or Joint Transport Authority [JTA] at this stage, I have been clear that, if it appears that collaboration is not going to deliver the step change in efficiency and effectiveness of transport services necessary,

¹³² WLGA written evidence page 4. The Simpson Compact is a signed agreement between the Welsh and local governments, which “signals a joint commitment to reform aimed at delivering improved and cost-effective services to communities across Wales”

¹³³ TraCC written evidence page 7

¹³⁴ Sewta written evidence paragraph 2.1

¹³⁵ Record of Proceedings paragraphs 22-26, 16 January 2013

¹³⁶ Professor Cole written evidence page 23

¹³⁷ Record of Proceedings paragraph 81, 29 November 2012

then I will look to use the Welsh Ministers' powers to create JTAs."¹³⁸

140. The then Minister later placed a different emphasis on his proposals when he told us that he was "not pursuing JTAs with any vigour at all." Rather, he was investing in the resources and capacity of the Regional Transport Consortia, who he believed had sufficient powers to deliver their objectives.¹³⁹

141. Network Rail was in favour of moving towards a single planning body and believed that the Regional Transport Consortia could fulfil that need "under a different remit." It told us that Passenger Transport Executives:¹⁴⁰

"Have brought benefits in urban areas - there is no doubt about that...they bring an aligned and strategic approach across all transport modes within their area. They can promote things like cross-mode ticketing...they can also borrow money, which is quite important."¹⁴¹

142. The Chartered Institute for Logistics and Transport was strongly convinced of the need for Joint Transport Authorities for Wales's largest urban areas such as Cardiff and Swansea areas, but less so for rural areas.

143. Sustrans UK did not think a Joint Transport Authority (JTA) was a "panacea". It stated that:

"There is a danger that transport will go off in one direction to make up JTAs around city regions and education will go in a different area with local government reform, which will mean that we make a fragmented system even more fragmented."¹⁴²

144. We received evidence from a number of organisations who identified a range of potential difficulties with implementing a Joint Transport Authority model in Wales. The Association of Transport

¹³⁸ Letter from the Minister to the Chair, 13 November 2012

¹³⁹ Record of Proceedings paragraphs 204-206, 24 January 2013

¹⁴⁰ PTEs are strategic transport bodies for city regions and are accountable to Integrated Transport Authorities made up of elected representatives of the Metropolitan District Councils they serve

¹⁴¹ Record of Proceedings paragraph 22, 10 January 2013

¹⁴² Record of Proceedings paragraphs 228-229, 21 November 2012

Coordinating Officers was against the idea of Joint Transport Authorities on the grounds of the cost of setting them up.¹⁴³

145. The Welsh Local Government Association suggested that “there would be substantial costs associated with establishing and operating..[JTAs]..and questions have to be asked about the ability to meet these costs in the financial and economic situation we face in the coming years.”¹⁴⁴

146. The four Regional Transport Consortia also questioned the benefits of establishing Joint Transport Authorities on grounds of cost, lack of local accountability and lack of full highway powers. For example, SWWITCH stated:

“A JTA without full highway powers will be of limited use and without links to travel generating activities (health/education etc) will create another tier of ‘dis’ integration rather than help. Setting up JTAs will cost a lot of money and take away local accountability.”¹⁴⁵

147. Oral evidence from the Regional Transport Consortia on 24 January 2013 appeared somewhat contradictory. Sewta suggested that Joint Transport Authorities would be another level of bureaucracy that would take away local accountability; Taith, however, pointed to the Passenger Transport Executive approach in England, particularly in Greater Manchester, and suggested it could maintain strong local government links while having a strategic overview of transport. The witness stated that the consortia believe that tailoring such a model to Wales would be “a more powerful approach than perhaps creating, by legislation, some body that will be different [from] local government in particular.”

Passenger Transport Executives

148. The creation of Passenger Transport Executives under the *Transport Act 1968* does not apply to Wales. In England the Integrated Transport Authorities that govern Passenger Transport Executives are made up of elected representatives of constituent local authorities nominated by councils.

¹⁴³ Record of Proceedings paragraph 153, 29 November 2012

¹⁴⁴ WLGA written evidence page 6

¹⁴⁵ SWWITCH written evidence page 3

149. Passenger Focus UK thought that the Passenger Transport Executive model “could” work in a Welsh urban and urban-rural context, and that it could provide a “clearer focus on aspects such as having control over ticketing, control over fare levels and control over integration.”¹⁴⁶

150. The Federation of Small Businesses Wales felt there was merit in the Joint Transport Authority approach, but thought the use of Passenger Transport Executives should be examined closely.¹⁴⁷

151. The Chartered Institute for Chartered Logistics and Transport believed that:

“The sorts of powers associated with the Passenger Transport Executives are more likely to bring about an integrated transport system. The regional consortia bring forward individual schemes to bring about integration. However, they tend to be very small-scale schemes to fit in with the grants available from the Welsh Government. I do not think that they have the vision that you would expect from what would be available from a Passenger Transport Executive.”¹⁴⁸

152. The paper provided by the Passenger Transport Executive Group suggested that a Passenger Transport Executive (PTE) model would be appropriate for Wales, and although currently PTEs tended to cover conurbations there was no reason why the approach could not be applied also to rural areas:

“It means there is a body which can focus entirely, consistently and coherently on delivering the best, most cost effective, and most fully integrated transport network that it can. A network which reflects the overall economic, social and environmental need of a sub-region whilst being accountable to all parts of that sub-region. This in essence is what PTEs / ITAs are.”¹⁴⁹

153. The Passenger Transport Executive Group’s written evidence listed the chief benefits of a Passenger Transport Executive/ Integrated Transport Authority model and argued that areas with PTEs had “generally superior” public transport provision than comparable

¹⁴⁶ Record of Proceedings paragraphs 148-149, 21 November 2012

¹⁴⁷ FSB Wales written evidence page 9

¹⁴⁸ Record of Proceedings paragraph 155, 16 January 2013

¹⁴⁹ PTEG written evidence paragraph 3.2

conurbations without a PTE.¹⁵⁰ It went on to say that arguably the model has never fully delivered on its potential because strategic highways and bus services are outwith its control.

154. Perhaps the most persuasive argument, however, was when we were told:

“With a passenger transport executive/integrated transport authority model, you have a formal governance system with representation from all the constituent districts...which is totally fair in terms of...political proportionality...So, any discussions between the constituent local authorities take place in an arena that everyone knows is fair. No deals can be done outside of that. That helps in terms of getting a common strategic direction; you do not have to keep having the same arguments all the time.”¹⁵¹

155. We agree with the then Minister that there is merit in seeing how effective the Regional Transport Consortia will be in growing their new roles and responsibilities but we also see the benefits of developing a more powerful regional structure, involving a broader range of interests and linking in very much with an economic development agenda.

156. Although Wales does not have powers to create Passenger Transport Executives, we see great strengths in the model and believe there should be a long-term plan to move towards such a structure and on a wider city region approach so that transport is integrated with all relevant policy areas. We have to question, therefore, whether the current Regional Transport Consortia operating on a voluntary basis and without executive powers are sufficient to create the effective, regionally integrated public transport network that we so need in the future.

Recommendation 25: the Welsh Government should:

Aim to strengthen regional transport structures so that they have the executive powers and capacity to plan and deliver all elements of integrated transport, including a thorough evaluation of the Passenger Transport Executive model.

¹⁵⁰ PTEG written evidence paragraph 2.4

¹⁵¹ Record of Proceedings paragraph 17, 4 February 2013

Annex A - Inquiry Terms of Reference

The terms of reference for the inquiry were:

- how well is Welsh public transport integrated, particularly in relation to bus, rail and community transport services, and what factors limit integration?
- how successful are legal, policy and administrative / delivery arrangements in Wales in supporting effective, integrated public transport services that meet the needs of Welsh travellers?
- what steps can be taken to improve public transport integration in Wales?

Key issues

Issues that we considered as part of these terms of reference included:

- how can the integration of rail, bus and community transport services in Wales be supported and improved to meet the needs of communities and businesses in both rural and urban Wales?
- how successful are Regional Transport Consortia in supporting the provision of effective, integrated public transport?
- how effectively does Welsh Government policy support public transport integration? In particular, the Welsh Government is considering the establishment of Joint Transport Authorities in Wales, and the feasibility of operating the Wales and Borders rail franchise on a not-for-dividend basis. Additionally, the Minister for Local Government and Communities has indicated that he is considering the use of quality partnerships and contracts in delivery of bus services. How far would these proposals improve integrated public transport provision in Wales?
- what innovative approaches to delivery of public transport in Wales might be considered to improve integration?
- how effectively do key stakeholders, particularly transport operators and public bodies, cooperate to ensure effective service delivery?
- how can the creation of a Network Rail Wales devolved route support effective, integrated public transport in Wales?

- what are the implications of the England and Wales High Level Output Specification and Statement of Funds Available for Control Period 5, published by the UK Government, for the development of integrated rail services in Wales?
- what examples of good practice in public transport integration can be identified within Wales, more widely within the UK and internationally?

Annex B – World Café Event

Purpose

The aim of this event was for the Enterprise and Business Committee to listen to the views and experiences of public transport users and user groups to provide an evidence base for its inquiry into integrated public transport in Wales.

A World Café is a discussion in an informal setting where participants share experiences and explore issues in small groups.

26 people attended from the following organisations: Ataxia South Wales, BayTrans, Bridgend Coalition of Disabled People, Bus Users UK, Bus Users UK Cymru, Disability Awareness Group (Taff Housing Association), Federation of Small Businesses South Wales, Heart of Wales Line Forum, Heart of Wales Line Travellers Association, North Pembrokeshire Transport Forum, Passenger Focus, Pembrokeshire Rail Travellers Association, Preseli Rural Transport Association, Railfuture, Railfuture South Wales, Severn Tunnel Action Group, Shrewsbury-Aberystwyth Rail Passengers Association, Swansea Access for Everyone.

Assembly Members hosted a series of round table discussions on the following five themes: fares and ticketing; coordination of services and timetables; marketing, communication and information provision; integration with land use and other policy areas; quality and reliability of services and infrastructure.

Each group fed back its comments to a final summary session. The following were the key points from the discussion.

1. Fares and ticketing: how far fares provide value for money and whether ticketing systems simplify or complicate travel.

- “fares are not fair” – pricing structures are not clear and it is not easy to understand why costs can vary so much between different areas, different operators and between local and long-distance travel;
- an alternative view was that fare structures were not as important as communicating fare information to the customer more easily and clearly;

- fares can on occasion be bizarre (e.g. being cheaper to travel from Ebbw Vale to Cheltenham via Cardiff than from Cardiff to Cheltenham on the same train);
- the system can be confusing (a “dog’s breakfast”, e.g. tickets not being valid on services run by different bus operators, even where they cover the same routes);
- public transport fares can compare favourably with the cost of travelling by car, but the convenience of using the car often masks the real and full cost of driving;
- travelling between different modes of transport should be “seamless” in terms of payment and ticketing;
- there should be full integration of payments and ticketing between Wales and the rest of the UK. Would that require primary legislation though?
- the Welsh Government’s pilot GOCYMRU smartcard (Wales’s version of an Oyster card) was considered an example of good practice, although it could be more transparent in how journeys are charged, and it was felt that it should carry concessions and offers;
- PlusBus was also considered good practice, although the initial journey to the train station is not included in the scheme;
- Arriva’s Club 55 and the Pembrokeshire Railcard were also well regarded;
- disabled travellers don’t receive the same standard of service, so there should be discounts for them and their carers;
- people who don’t have online capability are disadvantaged from booking in advance.

2. Coordination of services and timetables: issues involved in changing between different modes of transport and service providers, and also travelling between different areas, as well as how easily users can access public transport.

- there is inconsistency between standards of information between different travel operators, with little integration or coordination between them;

- integrated travelling is difficult, in particular for disabled passengers, owing to lack of accessibility and communication between different service providers, and lack of integration between bus and train travel times;
- lack of coordination between transport modes can cause stress for passengers - there need to be longer waiting times so that train and bus services or even train services by different operators all link up;
- waiting facilities at interchange stations need to be improved;
- timetables can be confusing - "you need a degree in timetabling";
- timetables tend to be commercially driven as opposed to catering for the requirements of users (e.g. services not running in the evenings or on Sundays);
- timetable information should show accessibility provision for each service;
- access to information, especially for disabled people, is poor; this could be improved with the provision of large print and audio timetables;
- there are anomalies when crossing the border with England;
- the Active Travel Bill will provide the opportunity to improve provision, but the Bill should include walking routes to transport hubs;
- community Transport is the neglected link, but it must be integrated with other modes, particularly in rural areas where older people can feel isolated in their own homes. It requires a "banging of heads";
- can taxis provide a community transport link in some areas?
- carrying bikes on buses and trains can be problematic - good practice example from Canada where buses carry bikes on the front of the vehicle.

3. Marketing, communication and information provision: how easy users find it to access information on services both before and during their journey.

- information provision during the journey is inadequate, particularly the lack of signage, real time information, and information for disabled people concerning accessibility;
- bus services are particularly unreliable and are often the reason why integration breaks down. Availability of information for buses is poor; 'real-time' information would therefore be most useful, as it would alert users to any delays and enable them to make alternative plans if required;
- Wales lags behind England in this area, and rural areas in particular are poorly served;
- problems have been experienced with Traveline information, including lack of fare information;
- quality of customer service from Arriva call centres can be poor, as most staff don't have local knowledge of the stations;
- bus timetables change so frequently the printed versions tend to be out of date almost as soon as they are published. Train and bus timetables do not often link up;
- new technology on trains and buses (e.g. audio visual facilities on buses) often doesn't work. There should be more audio announcements on buses;
- transport staff have a vital role in providing information, help and advice;
- the next rail franchise provides the opportunity to specify that transport staff walk the train;
- there should be better integration between public transport and shop mobility provision;
- closure of public services (e.g. post offices, hospitals) reduces the number of outlets that provide travel information;
- employers should have a role in providing travel information;
- it is important to encourage young people to travel on public transport from an early age by making it easy to use for them and their families;
- transport information for tourists is very important, both online and on paper;
- there is poor integration between different local authorities and regional transport consortia;

- transport providers need to improve their marketing strategies;
- community Transport provision is sometimes difficult to obtain;
- community Transport providers find that both they and local authorities have limited resources available to provide information;
- transport information needs to be available/accessible and up-to-date both online and in paper format.

4. Integration with other policy areas: how well public transport services are coordinated with wider policies such as land use planning, housing, education and health to ensure that transport services are provided when facilities or services are being developed.

- new development tends to focus on car usage: public transport is usually an “add on”, e.g. large out-of-town retail developments;
- a number of participants spoke about the difficulties they have experienced in visiting outlets such as McArthur Glen in Bridgend which is “virtually impossible” to reach by public transport;
- there is a need for greater involvement between local authorities and transport providers at planning stages to help tackle these issues;
- it is not clear how transport fits into the whole view of public service provision;
- all public service venues (e.g. health, leisure, education) should strategically consider their accessibility by public transport in the long as well as the short term;
- bus stops need to be situated directly outside hospitals so that patients and visitors do not have far to walk;
- transport providers should review the timetables of buses to take into account hospital visiting hours and the needs of users;
- there is a need for adequate car parking at train stations to encourage more users to “park and ride”, with longer opening hours so that they do not close in the early evening;
- there is also a need for better bus links to train stations;

- in some rural areas the only option if you are not a car user is Community Transport;
- Local Development Plans are the key mechanism for achieving an integrated planning approach between transport and other policies;
- accessibility needs will vary for different groups of people – the whole spectrum of disability needs to be catered for;
- less thought is given to people with visual impairments.

5. Quality and reliability of services and infrastructure: the quality of services and interchange facilities such as bus stops and bus and train stations.

- quality varies widely – it’s a “mixed bag”/”pot luck”, and different economic conditions have an impact on services provided;
- quality of services for disabled travellers is heavily dependent on the behaviour of the wider population, e.g. passengers or luggage occupying or blocking dedicated disabled spaces;
- quality of services for disabled travellers varies depending on whether they have booked in advance and have requested assistance at the station. This makes it difficult for disabled travellers to travel on the spur of the moment, as assistance at the station may not be available;
- flexibility of travelling on public transport for all passengers needs to be improved, so that it is as easy to travel on the spur of the moment as it is to plan a journey in advance;
- there should be first class carriages on Arriva trains;
- in the event of severe delays or cancellations passengers can find it difficult to contact family and friends because of the lack of communication channels on services. Stations that are not staffed (such as Llanelli station) are a problem in terms of safety as well as access to information;
- standards of transport need to be improved and made consistent – powers under the Transport Act could be better utilised in this regard;
- standards of accessibility on buses can vary widely;
- transport staff need to be trained to serve all accessibility needs;

- transport staff are important for creating a sense of security – concerns about safety and security are significant deterrents to using public transport;
- anti-social behaviour can be a real problem on some services and needs to be addressed;
- the British Transport Police need to take more action with anti-social behaviour, as currently there is a risk to public transport staff as well as users;
- cleanliness and comfort are also crucial, and a lack of cleanliness or comfort can put people off travelling by public transport. Many bus operators have significantly older vehicles, which are in poor condition, and there is a general lack of uniformity across services;
- there can be conflicts between passengers - wheelchair passengers and others, such as mothers with prams, all need proper space provision;
- many types of buses don't have sufficient space for more than one wheelchair user, and so wheelchair passengers travelling together are unable to do so;
- if services are right for disabled people then they will be right for the rest of the population;
- travel operators should consult users more;
- the location of stops and interchange stations could be improved (e.g. Swansea where the train and bus stations are a fair distance apart);
- concern that public sector budget cuts will impact on public transport services;

Annex C – Public Transport User Survey Results

Introduction

As part of this inquiry the Committee undertook a public transport user survey to gather evidence on user perspectives of public transport integration in Wales and to identify key integration issues.

A total of 61 respondents completed the survey. As respondents were self-selecting rather than identified through a representative sample of the population, this approach is subject to a number of limitations. In particular, the results cannot be considered representative of the population as a whole, and self-selection leads to a significant risk that respondents dissatisfied with public transport will be disproportionately represented. However, the survey results provide useful insight into the experiences of respondents as users of Welsh public transport.

How respondents use public transport

Respondents were asked three questions:

- how often they used bus, rail or community transport;
- why they used public transport; and
- whether they usually needed to change to reach their destination.

Bus was the most frequent mode of travel used by respondents: about half (54 per cent) used the bus monthly, weekly or daily. **Train usage was less frequent than bus travel:** over one third (40 per cent) used the train less than once a month. Eight out of 10 respondents never used **Community Transport**, limiting the usefulness of results for this mode.

Respondents used public transport **less often for activities which could be considered to be more functional and time critical.** About half used public transport at least monthly for both socialising and leisure activities (52 per cent) and shopping (51 per cent). However, around eight out of 10 (81 per cent) never used public transport for education purposes, while just over half never used public transport for work or business (51 per cent) and just under half never used it for doctor or hospital visits (47 per cent). Comments made throughout the survey **suggest that at least some respondents do not find public transport services to be effective for more functional purposes, although other issues such as the age of respondents and whether**

they are employed would also be relevant. This information was not collected during this survey.

A high proportion of respondents needed to change mode of transport frequently: exactly one third of respondents ‘almost always’ needed to change mode of transport and six out of 10 respondents ‘often’ or ‘almost always’ needed to change.

Ease of travel by public transport

Respondents were asked how far they agreed that **they could usually travel to the destinations they need to reach at the time they need to get there** by public transport, and **whether it is becoming easier to travel by public transport.**

Nearly six out of 10 respondents (59 per cent) disagreed or strongly disagreed **that they can usually get to where they want to go at the time they want to travel by public transport**, while about one quarter (27 per cent) agreed or strongly agreed.

A greater number, seven out of 10 (67 per cent), disagreed or strongly disagreed that **it is becoming easier to get where they want to go by public transport**, while fewer than two out of 10 (17 per cent) agreed or strongly agreed with this statement.

Thirty five respondents provided comments explaining their answers, three of which can be considered positive. The remaining responses were critical of public transport provision. The issue most commonly raised in comments was **service frequency** (22 comments). Other issues included **co-ordination of services; declining quality of service; infrastructure**, both in terms of quality and distance between stops and stations; **access for people with disabilities**; and **fare levels.**

Perceptions of current public transport provision

Respondents were asked how far they agreed with 12 statements on different aspects of current public transport provision. These aspects were grouped into three topic areas discussed below.

Frequency and co-ordinating public transport

Frequency and co-ordination are the areas where respondents showed greatest dissatisfaction.

More than six out of 10 respondents (64 per cent) disagreed or strongly disagreed with the statement **that waiting times are reasonable.** No respondents strongly agreed.

Seven out of 10 (70 per cent) disagreed or strongly disagreed with the statement **that public transport is available at the time they need it**. Two out of 10 (23 per cent) agreed or strongly agreed with this statement.

More than six out of 10 (63 per cent) disagreed or strongly disagreed with the **statement that public transport was available on the routes they needed**. More than two out of 10 (22 per cent) agreed or strongly agreed.

Fares and ticketing

Around four out of 10 respondents (42 per cent) agreed or strongly agreed that **public transport tickets are easy to understand**, while around one third (33 per cent) disagreed or strongly disagreed with this statement.

Dissatisfaction levels were relatively high for **train fares** as more than six out of 10 respondents disagreed or strongly disagreed that these **are reasonably priced**.

Dissatisfaction levels were lower for bus fares than train fares, but still remained relatively high as just over four out of 10 (44 per cent) disagreed or strongly disagreed **that bus fares provide good value for money**.

Access to Public Transport

Nearly six out of 10 (58 per cent) agreed or strongly agreed **that information was easy to access**.

Nearly four out of 10 (39 per cent) respondents agreed or strongly agreed that **they didn't have to walk far when changing** compared with one third (33 per cent) who disagreed or strongly disagreed.

Just over four out of 10 (45 per cent) respondents agreed or strongly agreed **that access to public transport was easy on foot** compared with about three out of 10 who disagreed or strongly disagreed (31 per cent).

Nearly six out of ten (57 per cent) neither agreed nor disagreed that **access is easy by bike**, suggesting that cycling is not a priority for most respondents.

Thirty two respondents provided comments when asked to explain their answer, of which 21 could be linked to the twelve statements included in the question. The largest number of responses (16 comments)

suggested a need to improve **frequency and co-ordination of services** to varying extents.

Priorities for improving public transport

Respondents were asked to prioritise the issues addressed by the 12 questions they had responded to in question five by ranking them from one to five with one as highest priority. Results were weighted to reflect the relative level of priority attached to each issue by individual respondents.

More frequent services was the highest priority identified by quite a significant margin (with a weighted score of 138) followed by improved timetabling to reduce waiting times (scoring 103). Cheaper train fares came third (scoring 92), closely followed by additional public transport routes (scoring 90) with cheaper bus fares ranked fifth (scoring 77).

The potential impact of improvements

Respondents were asked whether the improvements they prioritised would increase their likelihood of using public transport.

More than nine out of 10 (94 per cent) agreed or strongly agreed that the changes would encourage them to use public transport more, with about half (53 per cent) of respondents who completed this question strongly agreeing.

Even allowing for potential bias resulting from the possibility that respondents who have selected and prioritised improvements might be inclined to suggest their usage levels would increase as a result, the strength of this response is overwhelming. It suggests that were the quality of public transport provision to improve, respondents' use of public transport would increase, potentially by a significant margin.

Analysis by urban-rural classification

Respondents were asked to provide their postcode. Fifty valid postcodes were provided which allowed these responses to be allocated to the four settlement types included in the Office for National Statistics 'urban-rural classification.' Four settlement types were included: Urban (population over 10,000); town and fringe; village; and hamlet and isolated dwelling. The two smallest settlement types were combined in analysis of this survey so that three classifications were used. Analysis of results by urban-rural classification suggests variation between experiences and attitudes to public transport in Wales, for example:

Urban respondents were less likely to need to change mode than those in other areas.

Urban respondents found it easier to reach their destination than those in other areas, and were also marginally less likely to disagree with the statement that it is becoming easier to do so.

Frequency and co-ordination of services emerged as the biggest issue for all respondents. However, dissatisfaction levels were lower for urban respondents.

Train fares were a greater source of dissatisfaction for urban respondents than those from other areas.

Variations between settlement types are noteworthy as they emerged consistently through the survey results. However, they should be viewed with caution as the number of responses from the 'town' and 'village and smaller' classes was comparatively low (7 and 14 responses respectively).

Conclusion

The survey results show a number of common themes relevant to the Committee's inquiry. The primary reasons for respondents using public transport were shopping, socialising and leisure. Qualitative evidence from comments provided by respondents suggests this **may in part be because the networks are not always effective for more functional, time critical purposes such as accessing work or education, although other issues such as the age of respondents and whether they are employed would also be relevant. However, this information was not collected during this survey.**

A high proportion of respondents disagreed / strongly disagreed that they could usually get where they want to go by public transport, while a higher proportion (nearly seven out of 10) disagreed / strongly disagreed that it was becoming easier.

Issues related to frequency and co-ordination of service were the highest priority for respondents and more than nine out of 10 respondents agreed / strongly agreed that they would be more likely to use public transport if the issues they identified were addressed.

A number of differences between urban and other respondents were identified. In particular, the need to change was higher outside urban areas, and results suggest that urban respondents find public transport easier to use. However, significant dissatisfaction with urban public transport was also apparent. Additionally, train fares appeared to be a

higher priority for urban respondents, although frequency and coordination issues predominated in all areas.

Witnesses

The following witnesses provided oral evidence to the Committee on the dates noted below. Transcripts of all oral evidence sessions can be viewed in full at

<http://www.senedd.assemblywales.org/ielIssueDetails.aspx?IId=4436&Opt=3>

21 November 2012

Bus Users UK Cymru

Passenger Focus UK

Sustrans Cymru

29 November 2012

Association of Transport Coordinating Officers

Wales Transport Research Centre, University of Glamorgan

5 December

Community Transport Association Wales

Confederation of Passenger Transport

Lloyds Coaches

First Group

10 January 2013

Network Rail

16 January 2013

Arriva Trains Wales

Chartered Institute of Logistics and Transport (UK) Cymru Wales

24 January 2013

Regional Transport Consortia

Minister for Local Communities and Government

7 February 2013

Passenger Transport Executive Group

List of written evidence

The following people and organisations provided written evidence to the Committee. All written evidence can be viewed in full at <http://www.senedd.assemblywales.org/mglIssueHistoryHome.aspx?Ild=4436&Opt=0>

Organisation

Age Cymru

Arriva Trains Wales

Association of Transport Coordinating Officers

Councillor Richard Bertin, Vale of Glamorgan Council

Bus Users UK Cymru

Capital Traffic

Chartered Institute of Logistics and Transport (UK) Cymru Wales

Children's Commissioner for Wales

Suzanne Chisholm

Dick Cole, Bryn y Cwm Community Forum

Community Transport Association Wales

Confederation of Passenger Transport Wales

Disability Wales

Stephen Drewell

R H Edwards

The Federation of Small Businesses Wales

First Group

Kenneth Griffiths

Guide Dogs Cymru

D G HARRIS

Philip Inskip

The Institution of Civil Engineers Wales

Lloyds Coaches

Grahame Nelmes

Network Rail
Older People's Commissioner for Wales
Professor Stuart Cole, University of Glamorgan
Passenger Focus UK
Passenger Transport Executive Group
Railfuture
Sustrans Cymru
TAITH (North Wales Regional Transport Consortium)
TraCC (Regional Transport Consortium for Mid Wales)
Sewta (South East Wales Transport Alliance)
South Wales Chamber of Commerce
SWITCH (South West Wales Integrated Transport Consortium)
Welsh Local Government Association
Welsh Government
P A Willson
A Youde
Youth Are Funders