

# Our Roadmap to Bus Reform

**Towards One Network,  
One Timetable, One Ticket**

**March 2024**



Mae Trafnidiaeth Cymru yn eiddo i  
**Lywodraeth Cymru**  
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# Forewords

## Lee Waters MS Deputy Minister for Climate Change

Buses are a lifeline for many in Wales. As more people choose to travel by bus over car, we can substantially reduce carbon emissions from transport. Bus journeys make up three quarters of journeys by public transport in Wales but bus does not receive three quarters of the funding.<sup>1</sup>

For too long, Welsh bus services have been neglected. Passenger numbers have been steadily falling for decades. 60% of people in Wales have not taken the bus in the last year.<sup>2</sup> Some routes have been cut while others are oversubscribed.

To improve the bus network, we have to end the deregulation of the bus sector. Under the franchise model we would be able to run bus routes that work for local communities. People could travel the length of Wales using one ticket. A single timetable could be efficiently aligned with other buses and the rail service. Any profits could be fed back into the bus network.

A better bus network is a necessity if we are to hit our ambitious sustainability goals. If we want fewer people using their car, we need to change the current bus network. We need to drastically increase the number of people using the bus to make the network environmentally and economically sustainable. These goals are vital for the well-being of future generations.



## James Price

### Chief Executive Officer Transport for Wales

We all know that frustration of waiting at a bus stop for a bus that never turns up. For too long, passengers in Wales have been subject to that feeling. They have been waiting too long for a decent bus service. Despite the hard work of operators, local government and national governments over decades, we have not been able to break down the barriers to making bus services better. Working with Welsh Government and local authorities and bus operators, Transport for Wales is committed to building one transport network for Wales.



At Transport for Wales, we're about transforming how people travel. In regard to bus, that means a reliable service. We're introducing equitable fares and easy to understand ticketing. We're simplifying travel information and timetables. We want bus services to connect with trains. Franchising buses will allow us to do all of this and more. We're committed to ensuring that buses are at the heart of Wales's transport network. This will allow more people to travel comfortably and sustainably.

Future funding will be a challenge, which means the improvements we can make will be done incrementally. We're changing the fundamental plumbing of the system, which means there will be more control over how public funds are spent on bus services. When the funding becomes available, we can make the exciting changes the people of Wales deserve.

This report sets out in detail how we're going to deliver a better bus service. It will have to be a joint effort, incorporating all the best of the public and private sector. We will ensure we are engaging with and listening to passengers to build them the best possible network. It is a challenge we relish.



# Our vision

The Welsh Government and Transport for Wales are building an integrated transport network. This network will bring together walking, wheeling, cycling and public transport to make sustainable transport the easiest way to travel. Buses are a key part of this vision. We want to encourage more people to take the bus. The people of Wales need a reliable, affordable, flexible and easy to use bus network.

# About this document

This document has been produced by the Welsh Government and Transport for Wales to outline our proposed approach to bus franchising. It explains why we are introducing change, what our vision is for bus services in Wales, and how we are going to turn this vision into reality.

This document provides an outline of our current approach to bus franchising. Working with stakeholders and passenger representative groups, we'll continue to refine our approach to franchising the network.

A Bill is being drafted to provide the legislative basis required to introduce franchising. The new legislation may be subject to amendments during its passage through the Senedd. If this happens additional publications and guidance may be produced to update our approach.

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Part one

# The case for bus reform





# Introduction

In Wales, around 190,000 journeys are made by bus every day.<sup>3</sup> Three quarters of journeys by public transport are made by bus.<sup>4</sup> They are a vital service for the 19.4% of households in Wales without a car.<sup>5</sup> Decisions about bus services disproportionately affect women; Black, Asian and Minority Ethnic people; disabled people; older and younger people; and those with low paid or insecure work.<sup>6</sup>

Currently, the Welsh bus network is not fulfilling its potential. There are barriers to travelling by bus which can put people off travelling by bus altogether.

Barriers include poor reliability, tickets which are not accepted across multiple operators, information which is hard to find and trust, services which are not joined up and a lack of integration with other modes of transport. Some other barriers are less visible but can still put people off using public transport, for example, concerns around personal safety. The shortcomings of the current bus network are driven by wider systemic issues including deregulation, a history of pro-car planning policy and the coronavirus pandemic changing the way and the amount people travel.

If Wales is to meet the ambitious sustainability targets set by the Welsh Government, we need to change this. Helping people make sustainable transport decisions is a vital part of addressing the climate emergency. We have to make the right thing to do the easiest thing to do.

In March 2022, the Welsh Government published the White Paper One Network, One Timetable, One Ticket. It set out proposals to transform bus services. 96.1% of respondents agreed that change is required to deliver bus services that meet the needs of the Welsh people and respond to the climate emergency.<sup>7</sup>



We need to break down these barriers and enable people to travel by bus. Under the proposals set out in the White Paper, the current system of deregulation will be replaced by franchising. The current system of deregulation allows operators to run bus services commercially. This leaves local authorities with the responsibility of funding and providing socially necessary bus services. The current system makes it difficult to bring together commercial and socially necessary bus services in a way that puts the customer at the heart of the bus network.

Under franchising local authorities, Corporate Joint Committees, bus operators, Transport for Wales and the

Welsh Government will all work together to design better bus networks and services. Within the funding available, we will prioritise services that best meet people's and communities' needs.

Franchising brings together the strengths of private, municipal and community operators in efficient service delivery within a coordinated and planned public transport network. Franchising offers significant long-term benefits. That is why, after looking at the options and taking on board feedback, we are progressing with proposals to franchise the bus network. This change will benefit the people of Wales while accommodating local and regional needs and differences.

Bus franchising means that decisions about bus services in Wales (including routes, timetables, fares, hours of operation and service quality standards) will be made by Welsh Government and Transport for Wales. Decisions will be made in partnership with Corporate Joint Committees. Bus operators can bid for contracts to run services to these specifications.



# Why change is needed

## Making transport more sustainable

The transport sector accounts for too much of carbon emissions in Wales.<sup>8</sup> Little progress has been made to reduce carbon emissions compared to other sectors.<sup>9</sup> To reduce carbon emissions we need to encourage modal shift. Modal shift means changing from one form of transport to another. Buses are a greener mode of transport and are key to reducing people's reliance on cars. We need to give people a genuine alternative to the car for everyday journeys by making public transport, walking, wheeling and cycling an attractive option.

Llwybr Newydd: the Wales Transport Strategy 2021 set ambitious targets for increasing travel by sustainable modes of

transport. Our aim is to reduce the number of car miles travelled per person by 10% by 2030 and to increase the proportion of trips by public transport and active travel to 45% by 2040.<sup>10</sup>

Modal shift is key to reducing carbon emissions from transport. For example, a 2023 report commissioned by the Confederation of Passenger Transport modelled a scenario where greater bus use could lead to carbon savings of 0.8 million tonnes of CO<sub>2</sub> by 2050. This equates to the total transport emissions of Caerphilly in 2019.<sup>11</sup>

To meet our sustainable transport and carbon reduction targets, we need to make travelling by bus a more attractive option.





## Increasing the social benefits of public transport

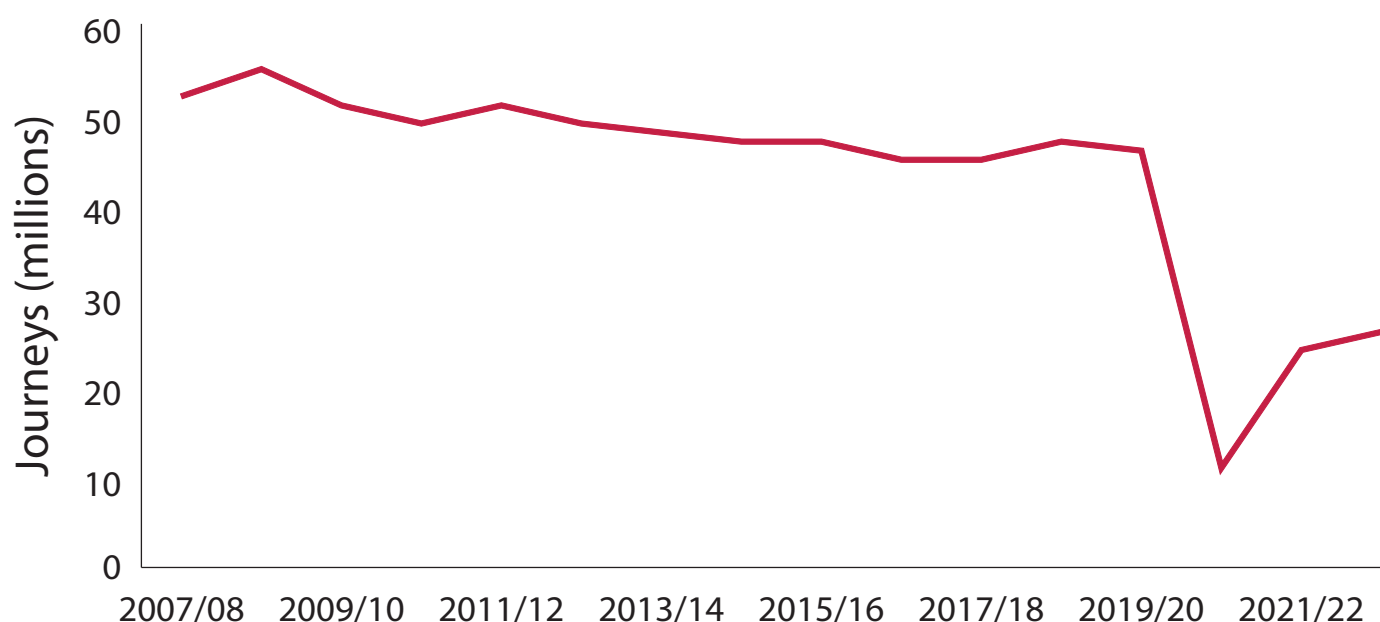
19.4% of households in Wales do not have a car.<sup>12</sup> This highlights the crucial social and economic role public transport plays for society. Our public transport network is a lifeline for people across Wales to access services, get to work, meet family and friends and connect communities.

In 2022/23, 26 million bus journeys were made by concessionary card holders.<sup>13</sup> Concessionary cards are issued to people in Wales over the age of 60 and to people who meet disability criteria specified by legislation. The coronavirus pandemic had a major impact on the travel behaviours of these groups. It has taken time for people to feel safe and confident to return to public transport. Today, the number of concessionary journeys by bus has not recovered to where it was pre-pandemic (see figure 1.1).

The Well-being of Future Generations (Wales) Act 2015 places a legally-binding duty on public bodies in Wales to improve the social, economic, environmental and cultural well-being of Wales. Improving public transport is an essential part of delivering the seven well-being goals outlined in the Well-being of Future Generations (Wales) Act 2015:

- A prosperous Wales
- A resilient Wales
- A healthier Wales
- A more equal Wales
- A Wales of more cohesive communities
- A Wales of vibrant culture and thriving Welsh language
- A globally responsible Wales.

**Figure 1.1: Concessionary passenger journeys in Wales, 2007/08 to 2022/23<sup>14</sup>**



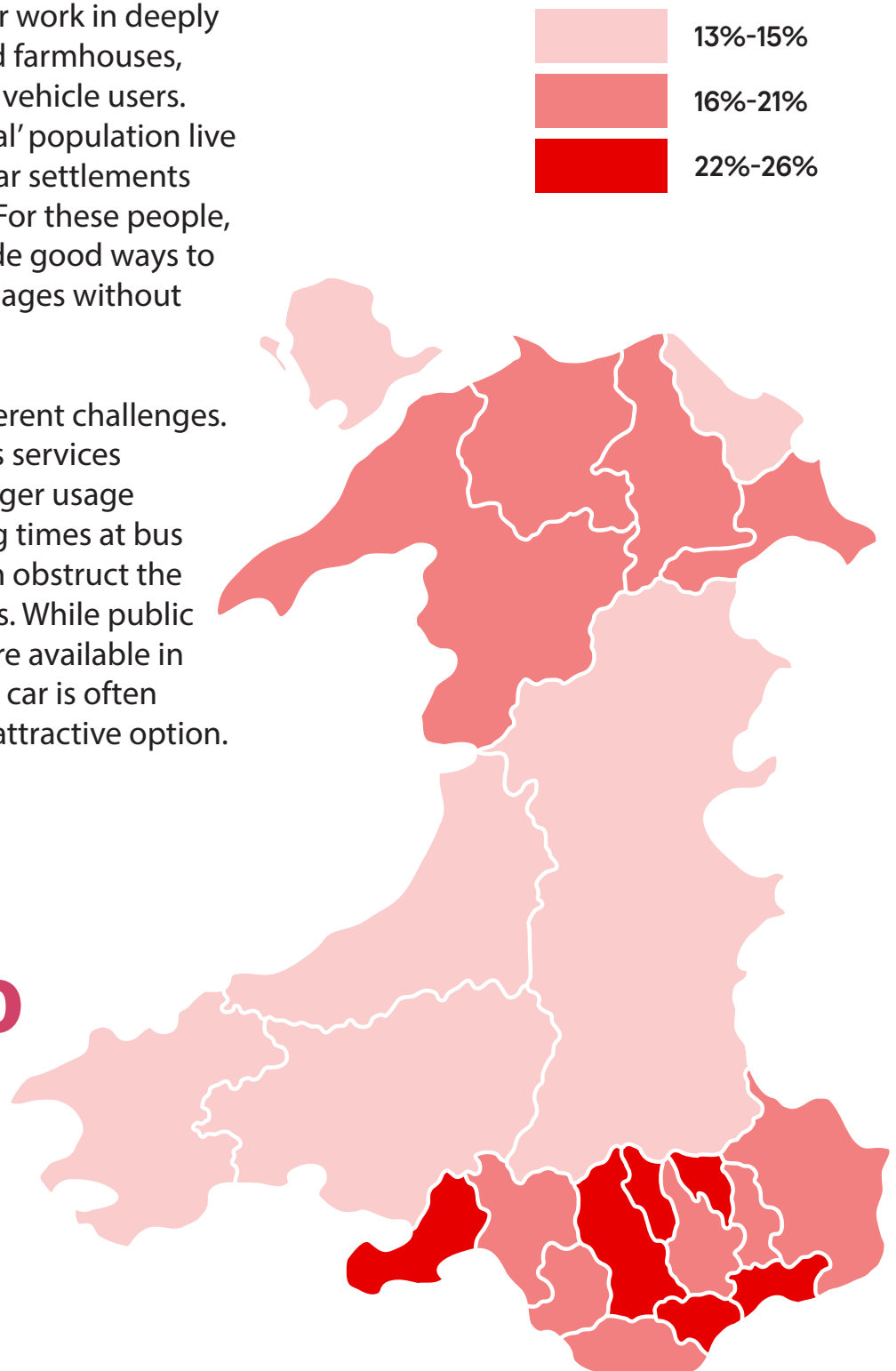
## Improving rural and urban bus services

A third of people in Wales live in rural areas.<sup>15</sup> People who live or work in deeply rural settings, like isolated farmhouses, will continue to be heavy vehicle users. However, most of the 'rural' population live on transport corridors near settlements with shops and facilities. For these people, we can sustainably provide good ways to get to local towns and villages without relying on a car.

Towns and cities face different challenges. Congestion can make bus services unreliable. Higher passenger usage can lead to longer waiting times at bus stops. Parked vehicles can obstruct the introduction of bus routes. While public transport is generally more available in built up areas, the private car is often considered to be a more attractive option.

**19.4%**  
of Welsh  
households do  
not have a car  
or van<sup>16</sup>

**Figure 1.2: Households without a car or van, Census 2021<sup>17</sup>**





We want to provide more equitable access to public transport across Wales and address the barriers to public transport that rural communities face. If we are to achieve our transport modal shift targets, real change is needed to connect communities to public transport and help people reduce their car dependence. We have a duty to provide a public transport service which keeps the people of Wales connected.

Our Rural Pathway will help those in the most isolated communities better access their local village or town. From there they will have a wider range of public transport and active travel choices to travel locally or to connect with other services for longer journeys.

Buses have a crucial role to play in this model, particularly demand-responsive services such as fflecsi. These can provide a more flexible and adaptable service to reach isolated communities and ensure as many people as possible have access to public transport. The community transport sector plays an important role in providing this sort of service, and we will work with them to learn from their experience and provide the most extensive coverage we can in rural areas.

However, buses are also only part of the answer, and we want them to work seamlessly with a range of transport options, including e-bikes and electric car clubs, to help people travel in rural areas.

Electric car clubs also offer a new way of looking at car usage both for those who want to use their car less or may only use it some of the time, and for people who may struggle to afford the high cost of running a car. Welsh Government and Transport for Wales are working in partnership with Powys County Council and a range of partners to look at how we can increase provision of community-based car clubs.

Working with Sustrans, the Welsh Government's E-Move pilot has shown the potential of free medium-term e-bike and e-cargo bike loans to support local communities. We will continue to develop our long-term approach to support people to take advantage of e-bikes for local journeys across Wales, including support to purchase them.

We will develop a bus system which works alongside these other options as part of an integrated network which helps people move around and make sustainable travel choices wherever they are in Wales.

## Connecting public transport services

We want our passengers to have a seamless experience when travelling on our public transport network. Under the current system of deregulation, the routes and timetables provided by different operators are not typically joined up.

Franchising will help us integrate buses with the wider transport network. We will be able to specify timetables to ensure buses connect with other bus routes, trains and other modes of transport. Having oversight of rail and bus timetables will enable Transport for Wales to coordinate a national public transport network. By working closely with local authorities, we will ensure local barriers to integration can be addressed.



# The shortfalls of deregulation

The bus industry in Wales has been deregulated since the introduction of the Transport Act 1985. This Act was intended to create a free and competitive market, where any operator can run any services they believe will make them a profit, subject to registration and minimum safety and operating requirements.

Currently in Wales, there are over 60 operators running local bus services. Around 20 operators provide other transport services running under a permit or a taxi licence.<sup>18</sup>

Even before the pandemic, significant public funding was provided to support bus services in Wales. Yet the number of bus passengers, bus routes and vehicles on the road continues to decline.

Since the coronavirus pandemic, fewer people have been travelling by bus. Before the pandemic, in 2019/20, 92 million journeys were made by local buses in Wales. However, 61 million journeys were made by local buses in 2022/23, marking a 33.4% decrease in pre-pandemic bus travel.<sup>19</sup> The bus industry has seen income fall and some bus operators have struggled to run a profitable service.

Deregulation means that bus operators can remove their services if they are not profitable. To ensure vital bus services are still provided, the Welsh Government has subsidised services through the Bus Emergency Scheme and the Bus Transition Fund. The Welsh Government have committed £42 million to supporting local buses between 2023/24.

Public funding can be better invested under a franchised model. Under this model, substantial funds can be reallocated to create a more efficient network.

The lack of regulation means that operators can plan commercial services without consideration of other public transport in the area. This can result in multiple bus operators running services along the same route. In some urban areas, this leads to multiple buses arriving at the same stop close together.

The current system lacks strategic direction. We want to be more efficient by removing duplication of routes. We want to create a simpler, connected and joined up public transport network that is easy to navigate.

Operators also set their own fares and inter-operator acceptance of tickets is rare. Having to buy multiple tickets can result in a poor passenger experience and put people off travelling by bus. We want to introduce one ticket which will allow people to travel seamlessly across buses and trains.

The deregulated model of bus services has not met people's needs. The current model is not capable of driving the transformational change needed to respond to the climate emergency. Franchising will allow us to reinvest the public funding that is currently being used to prop up a fragmented system. We can reinvest this money to deliver better buses, put the needs of the people of Wales at the heart of our plans and meet our ambitious transport modal shift and carbon emissions targets.



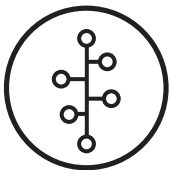
# Better bus services

To attract more people to use buses, we want to build a simpler bus network. We want to offer a wider range of journeys. We want to provide more reliable, frequent services. We want longer operating hours. We want people to make connections more easily across the network and with other modes of travel.

We have three objectives for the new bus system, which, when combined, support our modal shift ambitions:

- A bus network which is linked in with the rest of public transport in Wales and easy to navigate (One Network).
- Coordinated timetables which are easy to use and allow connection across public transport in Wales (One Timetable).
- Simpler ticketing which enables travel across public transport in Wales with affordable and consistent fares (One Ticket).

We are taking a whole product approach to redesigning bus services. This means we are considering everything that impacts the customer experience of travelling by bus, from the appearance of buses and the timetables we put out through to the arrangements we have with operators in the background.



**One Network:** A public transport network which is coordinated at a local, regional and national scale. All modes of transport are integrated. One network is easy to navigate with clear passenger information and good infrastructure, designed to serve the public good, optimising available funding.



**One Timetable:** Coordinated timetables can integrate bus services and other modes of public transport, to give people greater choice.



**One Ticket:** Simple ticketing and affordable bus fares. It means people can use one ticket across buses and trains.

# Timeline

Based on our current working timelines, we estimate the following key milestones will be delivered between 2024 and 2035. Further detailed timescales will be shared as the roadmap to franchising progresses.

## ○ 2024

- Transport for Wales will start to work with local authorities in North Wales to make some improvements to bus services ahead of the new legislation and form a 'Bridge to Franchising' (more details on page 46).
- The Bill will be introduced to the Senedd.
- Additional TrawsCymru bus routes will be managed by Transport for Wales, as existing local authority contracts expire.
- A real-time information system will be rolled out to provide information about arrival times and delays to customers waiting at bus stops, through various media such as digital displays and QR codes.

## ○ 2025

- The new legislation should become law, subject to agreement by the Senedd.
- Regional Transport Plans and Regional Transport Delivery Plans will be developed.
- Communication campaigns will commence to provide customers with updates about upcoming changes to bus services in their areas.



## 2026 - 2028

- Franchise roll out will commence, with the first franchise zones procured, mobilised and running under management by Transport for Wales.
- Planned trial of hydrogen buses in Swansea and Neath Port Talbot.

## 2028 - 2035

- Once Wales's bus network has been franchised, franchise packages will be reviewed, refreshed and improved.
- 39% of journeys made by sustainable modes by 2030.





Part two

# Delivering our vision together

# Ways of working

Bus reform means there will be a change in the way things are run, and how we work together. But the need to work together remains essential to achieve better outcomes. Local and regional collaboration is at the heart of our plans to franchise buses.

As the lead delivery partner, Transport for Wales is responsible for ensuring the transport system is nationally coherent and consistent. The Welsh Government and local authorities are responsible for holding Transport for Wales to account for delivering the objectives of One Network, One Timetable, One Ticket.

As the coronavirus pandemic emergency funding is coming to an end, we have worked with local partners on a regional basis to review bus networks and prioritise the most important services for communities. This work has helped align national funding with local knowledge and priorities.

Transport for Wales and the Welsh Government

plan to build on this existing structure to set up the 'Guiding Mind' model set out in the white paper. These regional teams will feed into a national structure in which we will bring together the four regional Corporate Joint Committees and representatives of operators, passengers and trade unions to agree our approach to bus franchising. This collaborative approach is central to bringing key decision makers together.

The Well-being of Future Generations (Wales) Act 2015 set out five ways of working that public bodies should follow to ensure decision making accounts for long-term requirements. These five ways of working underpin our approach to bus franchising.



## Collaboration

Collaborating and co-developing franchising will be essential.



## Integration

Better public transport can directly benefit all seven well-being goals. We need to continue considering the wider benefits of bus franchising as we move forward.



## Involvement

It is important that we involve people with an interest as part of the planning and delivery process.



## Long-term

We need to balance short-term needs, while safeguarding long-term needs.



## Prevention

By addressing today's problems, we can act to prevent problems occurring in the future or getting worse.

# Facilitating collaboration

All relevant parties should be involved at all points of the process. To enable this, Transport for Wales will:

- Facilitate the national and regional collaborative planning relationships.
- Provide technical advice, support and capability to help deliver an enhanced network.
- Ensure franchising is consistent and considers the needs of partners across Wales.
- Ensure integration with rail, active travel and other transport modes.

## Regional Transport Plans

The bus network will continue to include a combination of local services, regional services and cross-border services, as well as integrated TrawsCymru routes for longer distance journeys. Transport for Wales will facilitate the co-development of the network with local authorities, Corporate Joint Committees and other key partners to ensure it is strategically joined up across Wales and integrated with other modes of travel.

The four regional Corporate Joint Committees are due to produce Regional Transport Plans (RTPs) by the start of the 2025/26 financial year. The RTPs are multimodal, so they bring together all modes of transport within their plan. Within each region all public sector partners will deliver against a single unified RTP. Transport for Wales will work closely with the Corporate Joint Committees to ensure the proposed franchised network is aligned with and embedded into the multimodal RTPs.

This way of working provides opportunities for local authorities and Transport for Wales to enhance passenger experience and encourage behaviour change at a regional and local level. For example, strategic plans for local bus priority measures and active travel infrastructure can be introduced to by-pass problematic congestion hotspots and benefit the wider network.



# Social partnership and industrial relations

We'll work closely with trade unions in line with Transport for Wales's Social Partnership framework. The Social Partnership framework will continue to guide engagement with trade unions and all external partners.

The industrial relations landscape is complex, with different recognition agreements and bargaining rights across companies. Acknowledging these differences, we are committed to working with trade unions. They are critical stakeholders in delivering our vision for the future of transport in Wales.

Furthermore, to provide oversight and governance, Transport for Wales has set up a framework of Social Partnership meetings. This ensures that both operational and

strategic requirements are well-defined and supported by well-thought-through strategies that can be executed effectively and efficiently.

**Moving forward, there is a key action point for us to continue working closely with trade unions through the Social Partnership and Industrial Relations frameworks.**





# Taking people on the journey with us

Transport for Wales and the Welsh Government are committed to maintaining open and honest dialogue about bus provision with people across Wales and the borders. Understanding the priorities of our stakeholders and communities is key to building the bus network that Wales needs.

Transport for Wales has an established multimodal travel advisory architecture, shown in the diagram below. It brings together representatives from customer groups, government, industry and people with protected characteristics. They provide feedback, scrutiny, and advice. Transport for Wales’s Advisory Architecture is outlined in the diagram below.

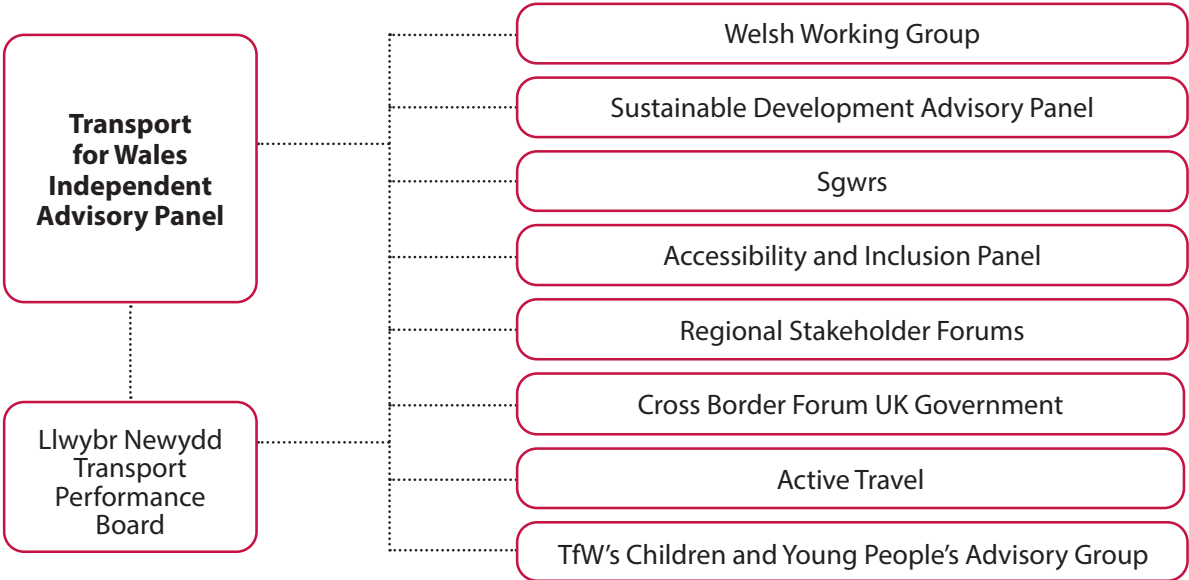
Our rolling programme of engagement activities will help us to:

- Partner with stakeholders, benefiting from their local knowledge and insight.

- Understand the needs of the public to deliver a passenger-centred bus network.
- Reach those who currently face barriers to using public transport and prompt modal shift.
- Ensure all partners are clear on their roles and responsibilities.
- Bring partners together to set a joint strategic direction for the future of bus services in Wales.

These activities will be delivered as we prepare, roll out and manage the franchised network. Stakeholders and communities will be included, informed and heard.

Figure 2.1: The multimodal travel advisory architecture



## Meeting the needs of Wales's diverse population

Decisions about bus services disproportionately affect women; Black, Asian and Minority Ethnic people; disabled people; older and younger people; and those with low paid or insecure work.<sup>20</sup> Some of these groups are less likely to own a car, and more likely to use and rely on buses and other forms of public transport.<sup>21</sup> There is evidence of persistent gender bias in the way public transport is planned and delivered.<sup>22</sup>

Actual and perceived lack of safety on public transport is a reported issue among LGBTQ+ people.<sup>23</sup> Nearly a quarter of transgender people in the UK avoid using public transport for fear of being harassed or outed as transgender.<sup>24</sup> Safety and low confidence when using public transport in the UK is also a reported concern from Black, Asian and Minority Ethnic people, and women.<sup>25</sup>

It is vital that we speak to and work with groups with protected characteristics to meet their needs. To do this, we will consult

Transport for Wales's accessibility and inclusion panel made up of people with protected characteristics. The panel is being expanded to have wider representation.

Transport for Wales launched its Children and Young People's Charter in 2023 and it has a Children and Young People's Advisory Group. The panels will help scrutinise relevant bus policies. They will advise us how to engage and support passengers to use bus services. They will help to address issues facing users, the barriers to non-users and open conversations to enable modal shift.

Transport for Wales is committed to ensuring that their workforce is representative of its users. Transport for Wales values diversity. It is determined to be one of Wales's most inclusive employers. This will help us create an inclusive transport network of which Wales can be proud.





## Communicating changes

We will deliver planned communications to help increase understanding and build confidence in changes to bus services.

Our communications will be bilingual and phased to match the key delivery milestones of the programme.

Our communications will include:

- Key messaging to communicate the vision, ambitions and achievements.
- Website and social media content.
- National to local targeted marketing campaigns.
- Media relations.



# Working together to transition TrawsCymru T1

The T1 bus route runs between Carmarthen and Aberystwyth. It was the first TrawsCymru service to be contracted by Transport for Wales on behalf of the Welsh Government. Working with Carmarthenshire County Council, we procured and provided new electric buses and a bespoke bus depot. Regular bus service was maintained during this transition. This ensured that passengers continued to benefit from the service.

Through public engagement and working with the local authorities, we were able to address the needs of local communities. This dialogue was essential in ensuring that route planning would link communities together and align with other public transport infrastructure.

Prelaunch engagement days were held for communities living and travelling on the route. These were organised in partnership with Transport for Wales, local authorities and bus operators. The engagement days showcased a new bus, timetable and fares.

The high-profile launch was attended by a range of stakeholders including passenger and transport organisations, media, local and national elected members, suppliers and

representatives from local authorities. The service carried its 100,000th passenger in July 2023 following its relaunch on 26 March 2023. During that period (April-July 2023) the T1 carried approximately 44% more passengers compared with the same period in 2022.<sup>26</sup>

In 2023/24, routes T1C, T2, T3, T6 and T10 were added to the Transport for Wales portfolio. Each TrawsCymru route has a dedicated delivery group organised by Transport for Wales that meets every four months. It includes representatives from local authorities, Welsh Government, bus operators and Bus Users Cymru. Transport for Wales is now responsible for the procurement, and monitoring of performance and quality. This will help us deliver a more consistent standard of specification and operation across Wales.







Part three

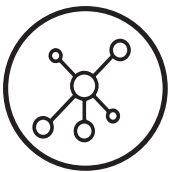
# Designing the future bus network



# Our whole product approach

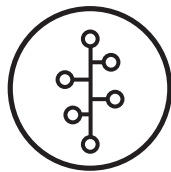
To achieve the objectives of One Network, One Timetable, One Ticket, we will take a holistic view of the way we govern, design and deliver bus services. Our whole product approach means we are taking a customer-centred, structured and repeatable process.

## The whole product principles



### **Network segmentation:**

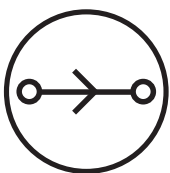
Understanding who moves around the network, why they move, and how they move.



**Network design:** Producing a data-led network-level picture of demand to run a service that meets customer needs and attracts new passengers.



**Efficient resources:** Removing duplication and complexity in the network.



### **Timetable and connections:**

Producing easy to understand timetables which improve reliability and connection times with other public transport.



### **Financial sustainability:**

Ensuring that the network is financially sustainable by improving efficiency and increasing passenger numbers. We want to reinvest revenue to continue improving services and deliver value for money.



**Branding:** Creating an inclusive brand identity for the bus network. We will use this to communicate the improvements we are making to our customers.



**Fleet and service quality:**

Consistent standards for vehicles and livery will help attract passengers.



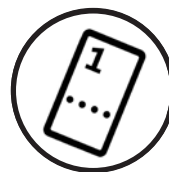
**Passenger information and infrastructure:**

Standardising information at bus stops, bus stations and online to help passengers plan and book their journeys.



**Contract design and procurement:**

Dividing the network into geographical contract packages and introducing an effective procurement process, which will make bidding for contracts accessible to small, medium and large operators.



**Fares and ticketing redesign:**

Simplifying bus fares and introducing integrated ticketing across operators and modes.

# Applying a whole product approach to Sherpa'r Wyddfa

The Sherpa'r Wyddfa bus service was launched in summer 2022. The service was funded by the Welsh Government and developed by local government and Transport for Wales in collaboration with Eryri National Park and the bus operator.

Visitor numbers to Eryri National Park have grown, resulting in serious car parking and congestion issues. The Sherpa'r Wyddfa bus service was introduced to help balance the needs of local residents and businesses with those of visiting tourists.

Working collaboratively with multiple stakeholders, Transport for Wales led the overhaul of the service. We delivered a range of improvements including:

- removal of service duplication
- improved connection opportunities
- better integration with other transport modes
- more consistent fare structures
- rebranding to identify and promote the new service
- helping local authorities consolidate and repackage contracts
- seasonal changes to the timetable to accommodate demand.

We have improved passengers' experiences with online journey planners, a new website and digital timetables.

Affordable fare structures make travelling by bus an attractive, viable alternative to travelling by car. During the summer an enhanced timetable is in place to support tourism. Easier, fairer payment has been introduced with contactless payments and fare-capping through Tap On, Tap Off technology.

Since the new service was introduced, passenger numbers and revenue has grown. During 2022/23 over 370,000 passengers used the service, 38% more than the previous year.<sup>27</sup>

Passenger growth may be attributed to the increase in tourism to Eryri and increased parking enforcement, alongside the service improvements. The volume of cars travelling to Eryri National Park is declining. This change in travel behaviour is encouraging. Through partnership working, we have delivered better information, greater frequencies of buses and an easier to use service. It provides benefits to locals and visitors alike and encourages modal shift away from cars.



# Network planning principles

Transport for Wales and local authorities have already started to work together to create a vision for the franchised bus network. A set of nine network principles has been developed to guide the design of a future network. We want to continue to co-create the future bus network with our partners. This will ensure the network is scalable, affordable, achievable and benefits communities across Wales. Together, we will evolve the bus network, adapting to changes in customer needs.

In partnership with local authorities, Transport for Wales has developed a set of network planning principles to shape the future network. These principles are guided by the ambition of One Network, One Timetable, One Ticket and wider Welsh Government policy ambitions. These principles will help us deliver a more efficient, coordinated, reliable network that Wales deserves and passengers can trust. Transport for Wales is collaborating with local authorities to embed these principles.

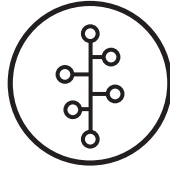
The network planning principles are intended as a foundation to guide and shape network design. They will be supplemented with wider input from partners to develop the future reference network.

Following the successful Gwynedd network assessment (see case study below) and from best-practice network design elsewhere, we are confident that these principles are robust. We acknowledge that it may not be possible to always implement all nine principles. The priorities will be balanced to deliver the best outcome for passengers. For example, different service frequencies may be required to serve peak demand on some busy corridors or to maintain connections at key hubs. We will revisit these principles as we develop the network to ensure they are still fit for purpose.

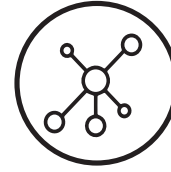
## The nine networking principles



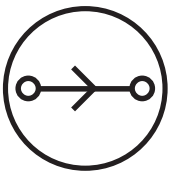
**Plan a single unified network:** Services are planned and arranged to create a unified network which is intuitive, easy to understand, and coordinated.



**Establish a core network, connecting key destinations:** The core network should form a permanent backbone of an integrated local or regional network.



**Secondary local and feeder services around the core:** Secondary local and feeder services should be formed around the core network, with lower frequency and/or demand responsive services.



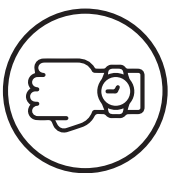
**Service directness for core bus lines:** The core bus services should be arranged as a series of straight-line services with minimal diversion.



**Consistent service line route:** Bus services should operate the same route at all times of day (with some limited alternatives in early/late periods). This improves understanding of the network and reduces operational complexity.



**Coordination of services on common corridors:** Services on common corridors should be rationalised to provide regular headways to optimise system efficiency and ease of understanding.



**Integration and co-ordination of multimodal services with convenient transfer and waiting times:** Bus services should be coordinated to create an integrated network to maximise connections between services and improve the range of destinations.



**Clock face departures:** Departure times for services at consistent times past each hour (for example, 00 and 30 minutes past every hour) improves passenger understanding of bus services.



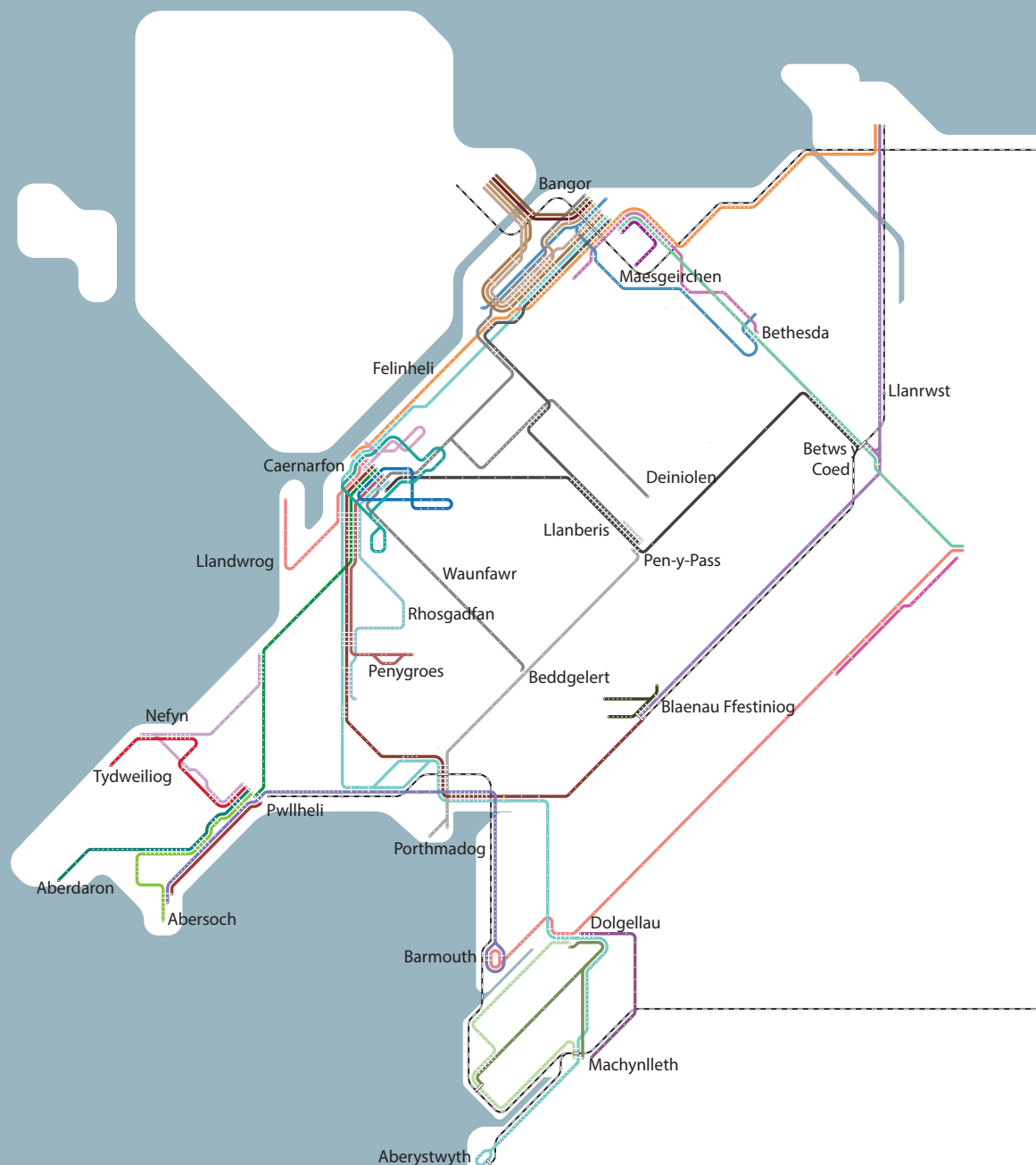
**Consistent operating hours:** Consistent operating hours across a network improves understanding of the network for passengers and provides certainty of transfer opportunities.

# Applying network planning principles in Gwynedd

Transport for Wales worked with Gwynedd Council to redesign an interim network in the region underpinned by these principles. A modelling exercise showed that nearly 40% of households would benefit from higher frequency services in the region. It showed that the number of households that would have access to key locations such as Barmouth High Street, Ysbyty Alltwen NHS Wales and Bangor University could more than double with the proposed changes.

While the implementation of the interim network in Gwynedd is subject to ongoing refinement and funding availability, the results of the modelling are very promising. This analysis validated the robustness of the planning principles.

**Figure 3.1: Network map of Gwynedd**



# A data-driven approach

Transport for Wales is using innovative tools to help shape the future of bus services. We need access to high-quality data to achieve this.

To get this data, Transport for Wales has introduced the Welsh Bus Data Service. Transport for Wales is now using national datasets to:

- Monitor bus passenger numbers and demand for services.
- Understand passenger demand to model the revenue we expect bus services to generate.
- Work with local authorities to identify areas of the network that are impacting service performance for operators, allowing us to propose potential infrastructure improvements.
- Test and simulate the proposed network and timetable in a virtual environment to propose service improvements and performance optimisation.

Transport for Wales has an established Geospatial and Strategic Analysis Unit. The team uses mobile phone data to measure transport demand across all modes of travel. Using new multimodal travel datasets like this provides a powerful tool to design a network that gets people where they want to go, when they want to go.

The new legislation will include provision for data sharing. This will ensure we can continue to access robust datasets into the future. This will allow us to make holistic, evidence-based network decisions.





# The wider bus network

## The role of fflecsi

Our on-demand bus service, fflecsi, picks customers up and drops them off at locations that suit them. In most cases, there is no fixed timetable as buses amend the routes they take based around demand.

The fflecsi service is, and will continue to be, a key part of Wales's bus network, particularly in rural areas. Areas that have limited or no bus services could be served by fflecsi services.

We are identifying where fflecsi can provide better access to public transport for people in areas not served by scheduled buses. In the future, fflecsi services will be franchised.

## The role of additional local transport services

Currently, some bus operators have a diversified business. They might provide local bus services alongside services such as home to school transport, non-emergency patient travel and community transport. Other operators specialise solely in the provision of local transport services.

Under the proposals of the new legislation, local authorities will retain their statutory duty for providing home to school transport. Community transport services will be able to continue operating without a franchise contract and community transport operators will not be expected to meet the conditions of franchised services by default. However, community transport operators will be able to bid for franchise contracts where appropriate.

We are committed to providing an accessible network for the people of Wales, to connect people to each other, to opportunities, to education and employment. We will partner with local authorities and additional local transport service operators to provide a joined-up approach to network planning. Through working with local authorities, we can understand where franchised bus services could improve access to schools, education and health services.

We will work with local authorities to explore opportunities for community transport schemes to thrive and continue delivering social benefit.

## A network for Wales and the borders

Cross-border services are vital for Wales's economy. They connect Welsh and English communities. We are identifying the opportunities to enable the better provision of cross-border services.

In some cases, we may be able to contract cross-border services either directly or in collaboration with bordering English local authorities. However, where this risks conflicting with the still-deregulated market in England, we are proposing to use a permit scheme. The use of permits will allow services into Wales while maintaining the standards of our bus network.

Conditions could be attached to these permits to ensure that these services align with Welsh franchising standards. We will ensure that the permit scheme is fair by working with operators. For example, Transport for London have set out [simple guidance](#) for operators who wish to run a service outside of their network through the London Service Permit.







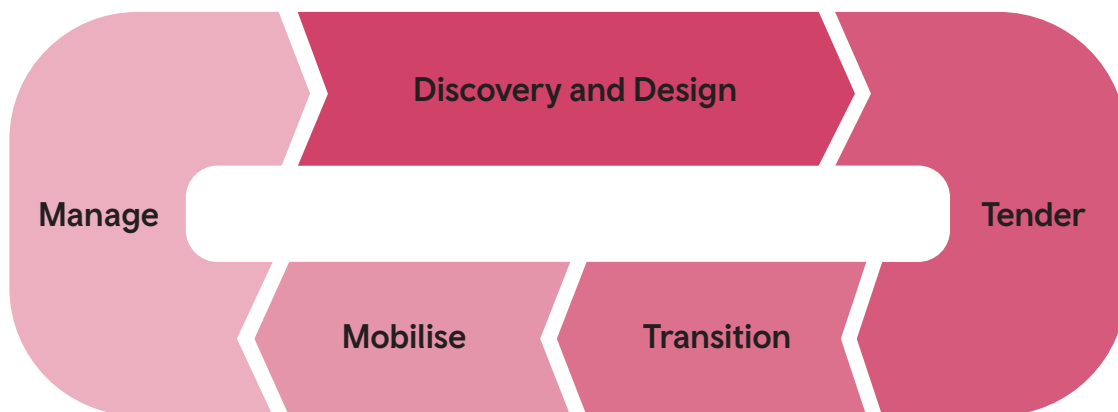
# Implementing our vision



# Delivery phases

This section outlines our proposed plan to deliver bus franchising, set out in relation to five core delivery phases.

**Figure 4.1: Our five core delivery phases**



The delivery phases will run iteratively. When we have established the franchised system in Wales, we will continue to work with local authorities and industry partners to evolve the network. Franchise contracts will be renewed and reviewed. This will allow us to implement lessons learned, identify opportunities to enhance efficiency, and improve passenger experience.

This means we can ensure our approach is fit for purpose and delivers the best outcomes for the people of Wales.

# Discovery and design phase

We are currently in the discovery and design phase. We are focusing on redesigning the future network and preparing a franchise system that is flexible, efficient and attractive to bus operators of all sizes. This phase will continue while the new legislation is introduced to the Senedd.





## Network development

Partnership working is essential for designing a network which is nationally joined up and meets local needs. Transport for Wales and local authorities have already started to co-create a future bus network. Further engagement and co-development is required to build on this vision. We are working with key partners and operators to do this.

Analysis has been conducted to understand the improvements a proposed network would make in Gwynedd. We plan to complete a whole network assessment to understand how the proposed network changes can improve national and regional bus use.

## Pathfinder projects

In partnership with the Welsh Government and local authorities, Transport for Wales is undertaking a series of pathfinder projects. These pathfinder projects enable us to test new ideas and validate planning principles in practice.

Previous pathfinders projects include:

- migrating the management of TrawsCymru services to Transport for Wales
- introducing multi-operator ticketing through the 1Bws ticket
- our plans to trial integrated bus and train Tap On, Tap Off ticketing in South East Wales.





# TrawsCymru Pathfinder

In 2023, Transport for Wales added the TrawsCymru T1 route to its portfolio. Since the Traws T1 migrated to Transport for Wales, we have been able to collectively introduce new developments to the service. Transport for Wales applied the 'whole product' approach, focusing on the whole customer experience.

This included purchasing buses with high-quality interiors, improving customer service and support, enhancing driver training and setting high quality operational standards, with a quality monitoring regime. Passengers now benefit from simpler fares, which are easier to understand, through the introduction of a distance based lower single fare structure.

The TrawsCymru T1 ticket is fully integrated with rail and a new website and app has been developed to help passengers plan and book their journeys.

The app enables passengers to:

- Plan journeys and calculate their carbon savings.
- Purchase mobile tickets.
- Track buses in real time.

We help connect passengers with rail services at Carmarthen and Aberystwyth railway stations. We have introduced live on-bus displays, which provide information about the next three trains departing from the respective train stations. Each journey at either end of the route is designed to connect with passengers arriving or departing by train.



## Funding the network

We are confident that the proposed new legislation will create an environment which enable us to deliver better bus services for Wales. We will work within the available funding to improve bus services in Wales. We are developing a detailed and comprehensive financial model which accounts for passenger fare revenue and the costs associated with running services. This model will guide our approach to franchising.

Public funding for bus services in Wales is significant. In recent years, the Welsh Government has provided multi-million pound funding through the Bus Emergency Scheme and Bus Transition Fund to protect bus services. Other significant public funds include the Bus Services Support Grant, local authority subsidy and concessionary fare reimbursement. This public funding can be better invested into a franchised system.

We want to reallocate these funds to deliver a network designed around passenger needs. Reallocating funds will create a more straightforward system for operators. It will consolidate these various funding streams into contractual payments.

We are also proposing to adopt an incentive-based gross-cost model in which Transport for Wales will pay operators a fixed sum to run the specified service(s). Through financial

incentives, operators would be rewarded for providing excellent quality bus services. Using this model means that Transport for Wales will be responsible for managing passenger fare revenue. This revenue can be reinvested into keeping the network running and improving bus services.

Taking a gross-cost approach does mean that Transport for Wales will be at risk from decreases in passenger fare revenue. However, under any model decreases in revenue will either require additional funding or making difficult decisions about reducing services. It is right that these decisions, where necessary, be made in the public interest.

This highlights the crucial relationship between financial sustainability and modal shift. Retaining and growing bus use is crucial to supporting a financially sustainable network, and a financially sustainable network, which people know they can rely upon, is crucial to giving people confidence to use buses. We will use our whole product approach to make buses as easy and attractive to use as possible for passengers. This is vital to ensure the bus network is financially sustainable and can create opportunities for growth. We will also agree additional funding mechanisms that can be established to support the introduction of the new system and sustain the proposed network.

## Simple, integrated ticketing

We will develop a structured and fair approach to fares that will offer good value to our passengers. To ensure our bus network is simple and easy to use, multiple forms of payment will be accepted.

We want to make travelling by public transport as simple as possible. A key part of this is providing One Ticket which can be used across different modes of public transport. We plan to introduce Tap On, Tap Off ticketing across buses and trains.

We are developing one app, that will make it simple to plan and book door-to-door journeys across transport modes in Wales. We will migrate existing Transport for Wales apps, including separate fflecsi and TrawsCymru, into a single Transport for Wales app.

## Bus stops, infrastructure and customer information

Bus stops, infrastructure and customer information are central to the passenger experience. They form a key part of our whole product approach. We want to provide easy to access information about bus services and keep passengers informed during their journeys. We want to provide timetables and access to real time information where appropriate, via various channels.

Local authorities will remain responsible for providing and maintaining bus stop, bus station and bus priority infrastructure. Transport for Wales is developing national bus stop infrastructure guidance to ensure consistent standards at bus stops and stations across Wales. To support local authorities, we are undertaking an audit of bus stop location datasets.



## Low carbon infrastructure

We are committed to addressing climate change through reducing car journeys and decarbonisation. We have to make the right thing to do the easiest thing to do.

We understand that a high quality, low emission bus fleet can attract new and existing bus users. As part of the Welsh Government's Net Zero Strategic Plan, we want to accelerate the transition to ultra-low emissions (largely electric) vehicles in Wales. On average buses in Wales are older than the UK average. As a consequence, they are more polluting.

Transport for Wales and operators will have to work together to deliver new ultra-low emission buses and any associated infrastructure. Transport for Wales will support this, by working in collaboration with the industry, within funding and supply constraints, to optimise the transition of fleet towards zero emissions over time. This will include providing a mix of low and zero emission buses.

We envisage that Transport for Wales will ultimately purchase and own the buses

used by operators to run franchised services, but in the short term there will be a mix of Transport for Wales and operator owned buses. Where buses are provided by Transport for Wales, the franchise operator will be responsible for operating and maintaining them.

Depot, charging and refuelling infrastructure will be required to support franchising operations and the transition to a decarbonised fleet. We plan to develop a mixed economy approach, for depots and supporting infrastructure including both public and private ownership. We will take a case-by-case approach to determine where public ownership of depots would deliver the best value. We will consider the impact of facilities on competition, and the interaction with the facilities needed for coach and school transport operations. Public ownership of depots is also a key enabler of decarbonisation. It can stimulate a wider low-carbon economy for Wales as the investment would also include the equipment needed for electric charging or hydrogen refuelling.

We want to ensure that our approach to depot provision generates equitable access for operators. The new contracts for TrawsCymru services demonstrate revised models where we provide fleet and depots. We want to use the lessons

learned from this to guide our approach to depot and fleet provision. We will continue to work with local authorities and test our plans with bus operators to reach the best solution we can for each part of Wales.

## Case study

# Bus repowering

We want to understand the options available to help us decarbonise buses. Purchasing new zero emission buses is an option. There is also other technology which could decarbonise bus travel.

For example, diesel buses can be converted to electric battery power. This is called repowering. Repowering buses involves removing the engine and other diesel related parts and replacing them with batteries and the electric specific parts.

Repowering buses is a sustainable option to transitioning our bus fleet. It would enable us to limit the number of buses that need to be scrapped in the near future, extend the lifespan of buses and make best use of the embedded carbon while also removing all tail pipe emissions.

This reflects our commitment to a circular economy. We will ensure materials are not wasted and can be utilised for as long as possible. Repowering buses in Wales could also create skilled jobs and drive growth.

Currently we are exploring the opportunity to convert diesel buses to electric. But going forward there may be the potential to repower to hydrogen, broadening the opportunities to support the future fleet.

# Transition and tender phases

## Geographical roll out

We plan to transition to franchising over several years, given the scale of the change. We are proposing to take a geographical approach to roll out. In order to simplify roll out, and based on lessons learned elsewhere, we plan to segment Wales into zones. These zones are subject to change as the plans for franchising develop, but will be based on the customer profile and the composition of the proposed network. Engagement between us, local authorities and operators will be required to refine and agree the locations and boundaries of these zones.

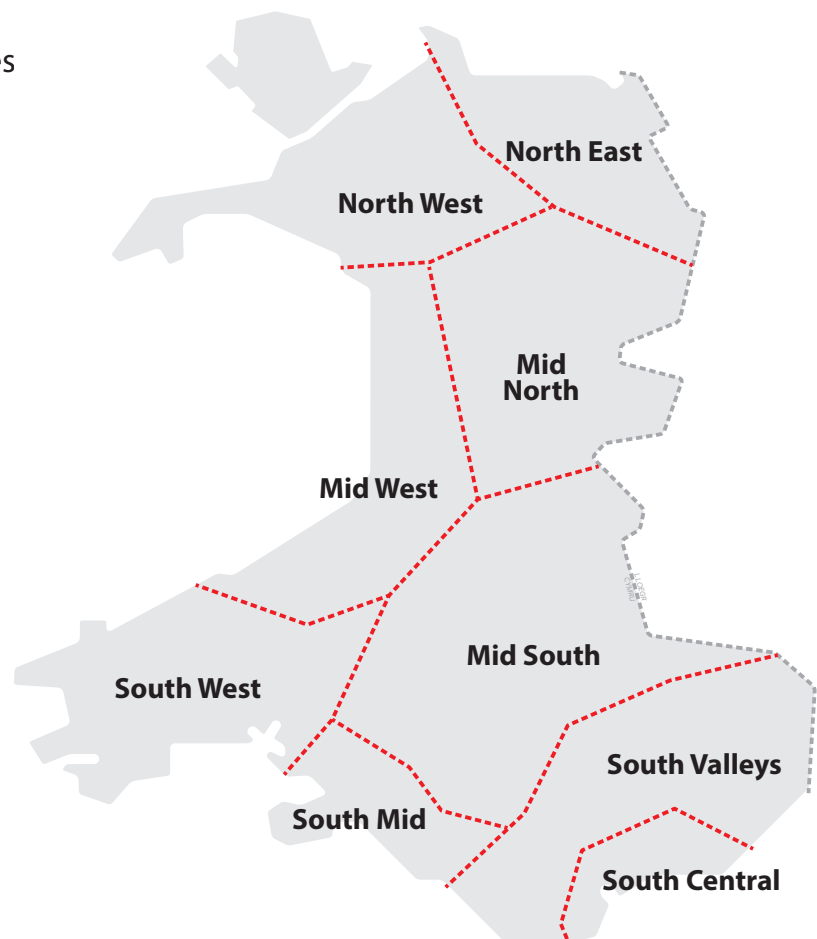
It is important to note that these zones will not equate to franchise packages. Rather, there will be a series of franchise opportunities made available in each zone. This is similar to Transport for Greater Manchester's approach where franchising is being rolled out across three distinct areas.

A timetable for the roll out of franchise areas and packages is under development. This timetable will be shared in due course. We will issue detailed time scales to support operators in their preparations to bid for franchise contracts. We plan to deliver some improvements to the network and bus services ahead of the new legislation, particularly in North and Mid Wales, where the networks are largely local authority contracted.

The key considerations we will make when agreeing the sequencing of franchise areas include the:

- complexity of the network, including cross-county and cross-border movements
- current levels of control and competition within those zones
- ability to grow revenue in the area
- bus decarbonisation opportunities available.

**Figure 4.2: Potential franchise areas**





## The bridge to franchising

We want to improve services at the earliest opportunity through a bridge to franchising. Before franchising formally commences, Transport for Wales will work closely with local authorities and Corporate Joint Committees in North and Mid Wales to improve the bus network in their areas and improve contract terms.

Currently, local authorities can contract routes which are deemed to be socially necessary. In North and Mid Wales, where many bus services are not commercially viable, a high proportion of the network is already tendered by local authorities. This provides an opportunity to start making improvements.

We will continue to work closely with local authorities, operators and stakeholders to focus on improving the network by applying the core network principles, taking our 'whole product' approach and improving the contracts of local authority tendered services. This bridge to franchising aims to support Transport for Wales, the Welsh Government and our partners, including the industry, to prepare for the changes franchising will bring. For passengers in this region, we want the transition to be seamless, with people already benefiting from new routes and timetables.

## Transitioning existing contracted services

In some parts of Wales, there are a mix of commercial and local authority supported services. Some bus services are partly subsidised by local authorities to support them during times when they may not be commercially viable. For example, they are supported to maintain a Sunday service or regular frequency during off-peak hours.

As part of the national interim network planning process, Transport for Wales has collaborated with local authorities. This has helped Transport for Wales understand how contracts can align with the proposed roll out plans.

## Transitioning commercial operations

The new legislation will prohibit bus operators from running commercial services at their discretion. This will not, however, apply immediately for all of Wales. We expect that a mix of franchise packages and commercial operations will coexist in parts of Wales until we have completed the full roll out.

We are developing transitional arrangements to enable this. For example, where franchise packages have not yet been rolled out in an area, operators will be able to continue running services as they do now. We expect that services which cross the boundaries between areas where franchising has been rolled out and where it has not, will be allowed to continue.

New or changed services would be able to apply for permits to cross into the franchised area. Permits would be awarded where proposed services will benefit passengers in Wales without detracting from our wider public transport system. Permits may be subject to conditions such as providing appropriate information to be made available to passengers on the same platform as information about franchised services.

We will work with operators to provide as much certainty as possible on the roll out of franchising. We will issue guidance for operating commercial services during the transitional period to support operators.



# A market for Wales

Currently in Wales, there are over 60 operators running local bus services and around 20 operators providing other transport services running under a permit or a taxi licence.<sup>28</sup> Following the introduction of deregulation from the 1980s, a number of municipal operators were dissolved and purchased by private companies. Today, there are two municipal operators providing local bus services in Wales.

As is the case in the current bus market in Wales, it is anticipated that a healthy market will continue to include multinational operators, municipal operators and small to medium sized enterprises (SMEs). The white paper also set out our plans to allow local authorities to set up new municipal operators should they choose to. We want to create a procurement approach which attracts operators that can deliver high quality services and social value.

**Moving forward, there is a key action point for us to work closely with the market to agree the most appropriate mechanisms for multi-national operators, municipal operators and small to medium sized operators to participate in a franchised market.**

We will work with local authorities and the market to discuss and test approaches to packaging the proposed network into franchise contracts. This will take into account local circumstances and encourage operators to make competitive bids to provide bus services.

Transport for Wales will lead the procurement process and will collaborate with Corporate Joint Committees, and the Welsh Government for this. The procurement process will seek to allow operators to compete for contracts most suited to their size and nature of business. The procurement routes for each of these package types have not yet been determined. We expect to procure services either through open competitions published on Sell2Wales or through a framework where suppliers will be able to join at any point.

## Mitigating potential market risks

As part of the invitation to tender, Transport for Wales will specify the routes and timetables or key timing points. We want to work with operators to design a procurement approach which provides enough flexibility for innovation. For example, operators could identify cost saving and service improvement opportunities, where appropriate.

Bus operators can submit bids. These will be assessed and evaluated for service quality, customer experience and value for money. A key feature of our procurement process will be the inclusion of social value, as part of our efforts to meet the goals of the Well-being of Future Generations (Wales) Act 2015. Our approach to including and measuring social value should enable us to maximise the additional benefits associated with bus franchising. It will ensure the procurement exercise is accessible for SMEs. We will engage with local authorities and bus operators as we develop this process.

Bus franchising is likely to reduce the probability of bus services ceasing in the long term. To address the unlikely events of market failure, such as the contracted operator entering administration, we will introduce measures to protect bus services. Our franchise agreements will describe how market failure will be managed.

The Welsh Government are not proposing to legislate for a specific mechanism to account for contractual failure of franchised services. We will make alternative arrangements should a contract fail. We will be subject to procurement and competition rules, but these might allow us, for example, to work with other franchised operators in the area to take on the services, award an interim or replacement service to another operator or to replace a failed contracted service directly.



## Protecting jobs

Under franchising, bus drivers and people working in bus operations will continue to be employed by bus operators. They will not be employed by Transport for Wales.

Our Social Partnership framework will enable us to understand how the employment of drivers and operational colleagues can be protected if an incumbent operator is unsuccessful at contract award. The Transfer of Undertakings (Protection of Employment) Regulations (TUPE) may apply and provide protection for colleagues.

We are aware of trade unions' aspirations to create a standard set of terms and conditions across Wales. We have committed to work in collaboration with trade unions to create a solution for Wales.

Transport for Wales will engage with trade unions to align on the approach for developing social partnership commitments under the franchising model. This will ensure an inclusive and productive working environment for existing and new operators as they enter into social partnership arrangements.

Bws Cymru (2021) acknowledged the existing challenges in the bus and coach industry around staff availability. It highlighted driver shortages and difficulties in recruiting new drivers. Since this report was published, driver shortages have increased. Transport for Wales will collaborate and engage closely with trade unions and the industry to address these challenges.





Part five

# Achieving success





# Delivering our objectives

Transport for Wales will be held to account by the Welsh Government and local authorities for ensuring the design and development of the franchised bus network satisfies the objectives of One Network, One Timetable, One Ticket.

We believe a successful franchising system will enable us to:

- Build a network which gets people to where they want to go.
- Meet our ambitious modal shift and climate targets.
- Partner with bus operators to run a thriving, innovative bus industry in Wales.
- Provide efficient, reliable bus services.



## Network performance

As part of the franchising contracts, we will specify the data that bus operators must share with Transport for Wales for performance management purposes.

Currently the landscape in which we have access to data is fragmented. We will be able to better understand travel demand, performance of bus services, and where there are opportunities to make improvements.

Transport for Wales will monitor and analyse this data. We are committed to making the findings publicly accessible. For example, Transport for London publish annual network performance reports and quarterly summaries on their website. We aim to provide similar reporting.

## Modal shift and integrated travel

Llwybr Newydd: the Welsh Transport Strategy 2021 has set ambitious targets for changing the way people travel. A key success factor of bus franchising is the extent to which we help people make the choice to travel by public transport instead of the car.

To support this shift, providing an integrated transport network with passenger-centred, reliable services is critical. Passengers should have a seamless experience travelling across modes of transport in Wales.





## Customer satisfaction, social benefits and safety

We want to ensure that bus travel is an attractive, reliable, accessible mode of transport for the people of Wales. The customer is at the heart of our plans. We will be sharing a customer charter setting out our commitments soon.

We will be listening to the feedback of our customers and local communities to improve bus services. We plan to capture feedback through a variety of channels. In the future these will include:

- The National Travel Survey
- on the ground engagement
- the Transport for Wales customer service centre
- the Transport for Wales Sgwrs customer panel
- engagement with passenger groups
- via social media.

Improving bus services will help connect people to places, communities, and opportunities – which can deliver significant social benefits. We want passengers to be and feel safe on our public transport network.

## Evolving our approach

We expect the franchised bus network to evolve. For example, we will need to adapt to changing travel demand. This could include serving new housing developments and responding to employment opportunities. Where we plan to make changes, we will work in partnership with stakeholders. Any changes will be done to an agreed time line. We will communicate important network changes to our customers.

We plan to review franchise contracts at the end of their duration. This will allow us to vary contract requirements for greater value for money and better customer experience. We will embed our learnings as we roll out franchising.

# Endnotes

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- 21 Equality and Human Rights Commission, [Is Britain Fairer? The state of equality and human rights, 2018](#), June 2019, p172.



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