Sewta

Moving People Yn Symud Pobl

# Sewta response to the

# National Assembly of Wales
# Enterprise & Business Committee

# Inquiry into Integrated Public Transport

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## 1. Introduction

1.1 The South East Wales Transport Alliance (Sewta) is a joint committee of ten local authorities in the region; Blaenau Gwent, Bridgend, Caerphilly, Cardiff, Merthyr Tydfil, Monmouthshire, Newport, Rhondda Cynon Taf, Torfaen and the Vale of Glamorgan. Sewta is charged with preparing and co-ordinating regional transport policies, plans and programmes on behalf of its constituent councils, including the statutory South East Wales Regional Transport Plan (RTP). We work with industry partners and the Welsh Government to improve regional transport in south-east Wales. We are the largest of the four transport consortia in Wales and are pleased to present evidence on the Committee's interest in integrated public transport.

1.2 Sewta welcomes the committee's inquiry into integrated public transport. We believe that the rather limited amount of integration within the public transport system of South East Wales is one of the most important problems of the transport system and needs to be tackled comprehensively to provide the accessibility, connectivity and mobility to grow the economy, improve social inclusion and protect the environment.

1.3 In addressing the committee's inquiry, Sewta believes it is essential that we begin with a scrutiny of what public transport integration means and could mean for South East Wales and Wales as a whole. These will be addressed in the following sections. The final part will focus on further comments and conclusions.

1.4 Public transport integration is also core to the Metro vision. Sewta has embraced the Metro concept within a broader Sewta Metro Plus proposition, and is currently undertaking a study to develop further a portfolio of integrated regional development transport proposals for the forthcoming update of the South East Wales Regional Transport Plan.

1.5 This study will report later this year. However, a number of organisational, financial and legal issues will need to be addressed to enable successfully integrated public transport systems. These are addressed in Section 2. Sections 3-7 then set out the key features of a properly integrated public transport system, and for each issue the current situation and the necessary improvements. Another, equally important issue is integration at planning level, which is addressed in Section 8.

## 2. Support for integrated public transport policies

2.1 Sections 2-7 set out the key factors needed for a successfully integrated public transport system. The key factors that limit successful integration can be summarised in three categories, organisational, financial and legal.

- Organisational

  Any integrated regional public transport system in Europe, has at its heart a regional public authority that is responsible for planning and implementing the system. Since its foundation, Sewta has provided a forum for collaboration on public transport integration between local authorities, the Welsh Government, users' representatives and transport operators, through the Sewta Board and supporting technical working groups.

  Sewta has made clear[1] that additional powers and resources would be needed at the regional level to deliver a more ambitious integrated transport programme. The report further notes that governance arrangements that would facilitate public transport integration are vital, and need to include integration with land use planning, economic development and regeneration.

  Sewta believes such changes to organisational and governance arrangements are best built on those already in place. In particular the Sewta Board, as a statutory joint committee, can provide both the regional leadership and local accountability to take on the role of the required regional public authority.

  Sewta is a partner in the Minister for Local Government and Communities' South East Wales Integrated Transport Task Force. This is currently preparing recommendations for governance arrangements which will drive the implementation of a shared vision of bringing about a truly integrated transport system for the region.

- Financial

  The current financial arrangements and levels of funding for public transport in the region are not conductive to delivering effective public transport integration. In terms of capital investment, steady and dependable funding is required to deliver the full Sewta Metro Plus proposals, including a reliable funding commitment that looks beyond current funding horizons of only one year at a time.

  The development of integrated ticketing will require funding, including funding for the set up, as well as start-up financing for the first couple of years while the system beds down.

  The current proposals to regionalise support for bus services, together with the requirement to develop regional bus network strategies, are a step in the right direction. However the simultaneous reduction of funding by 25% is a major concern, that will severely undermine the associated good work that is emerging from the Bus Funding Review, as well as Sewta's ability to improve integration.

[1] Sewta Board report: "A Metro for Wales's Capital City Region – Sewta Metro Plus" agreed March 2012,

It should be noted that developing properly integrated public transport would transform the value for money of public transport investment. For example, delivery of electrification could deliver higher benefits if integrated with other transport systems, such as key interchanges in accordance with the Sewta Metro Plus principles.

- Legal factors

  Despite the changes made by the Transport Act 2000 and the Transport (Wales) Act 2006, bus services in provincial Britain are still effectively governed by the 1985 Transport Act, with its emphasis on competition rather than co-ordination. As a consequence, and in contrast to arrangements for London, there are severe limits on what public authorities and bus operators can do to integrate services and fares. Local authorities are reluctant to take the lead, as their primary role is defined as reactive, leaving the commercial network to its own, and procuring only those socially-necessary services that would otherwise not operate.

  As stated, Sewta supports the introduction of a more efficient and effective bus regulatory system. Sewta does not believe that the Quality Bus Contracts which could be implemented under current legislation would solve the issues described above. We would like to work with the Welsh Government on a thorough analysis of the current system, and on developing proposals (including those for legislative change) that enable and facilitate integration instead of hindering it, and most importantly, that put passengers first.

## 3. Integrated public transport

3.1 As set out in our Regional Transport Plan, Sewta considers the limited amount of integration in the public transport network as a key barrier that needs to be addressed[2]. We believe the region needs a *modern, accessible, integrated and sustainable transport system*[3] that helps to develop the economy, promote social inclusion and equality, and protects the environment[4].

3.2 There are many good public transport services in the region (although examples of bad practice can be found too). However too many of the good facilities and services are less successful than they should be because they are not fully part of a properly integrated public transport system. While there are many improvements that can be made to the public transport system, our response will, as per the terms of references for this inquiry, concentrate on the key features required for such a properly integrated public transport system. We believe successful action on these features could bring about substantial benefits, not just because of their own value, but because they enable all other parts of the public transport system, and any future improvements to it, to work much better.

3.3 The ability to offer fully integrated public transport will support wider Welsh Government objectives and policies, such as active travel and sustainable tourism. Sewta recently commissioned a study to examine the role of sustainable transport in tourism[5]. The findings of this report highlight a number of issues where a lack of integration provides a barrier to the use of more sustainable modes, such as information and ticketing.

3.4 The four key features of a properly integrated public transport system are:

- Fully integrated ticketing
- Appropriate timetable coordination
- High-quality interchanges
- Integrated public transport information

3.5 A fifth, equally important issue is integration at planning level. Each of which we will discuss in more detail below.

[2] South East Wales Regional Transport Plan, section 4.3.3
[3] South East Wales Regional Transport Plan Vision, section 3.1
[4] South East Wales Regional Transport Plan Wider Goals, section 3.2
[5] Sustainable Transport in Tourism, July 2012

## 4. Fully integrated ticketing

Background

4.1 Improved ticketing arrangements are a key component of integration between services and between public transport modes. A single integrated ticketing system, and more easily understood ticketing arrangements, reduce barriers to the use of public transport and improve transfers between connections. This enables more seamless travel, and brings benefits in terms of affordability, convenience and time-saving for both existing and potential future passengers. Provision of integrated ticketing, facilitated by widespread use of smartcards, is an important part of Sewta's proposals for achieving transport integration.

4.2 This is supported by the findings of a study undertaken on behalf of the Passenger Transport Executive Group (PTEG) into the benefits of simple and unified ticketing structures, which found that the introduction of such systems can lead to substantial patronage growth in the range of 6% to 20%, with some modes experiencing increases of the order of 40%. Examples include a patronage increase of up by 12% in the two years following the introduction of zonal and integrated ticketing in Zürich, and annual average growth of 7.5% a year in patronage since the simplification and integration of public transport fares in Freiburg (Germany). In London it is estimated that a third of the increased use of public transport since 1999/2000 can be attributed to Oyster and other ticketing simplifications.

4.3 In addition to patronage increases, the study found benefits in terms of increases in recorded passenger satisfaction, evidence of resulting modal shift, increases in revenue, reductions in transaction and administrative costs, social benefits, reductions in fraud, wider contributions to city life and identity, acquisition of accurate data on passenger travel behaviour enabling better capacity and network planning, and faster boarding times enabling buses to run faster, and more reliably and frequently[6].

4.4 The Sewta Metro Plus study is also looking into integrated ticketing, the purpose of which is "to create a single system for users, enabling users to make the best journey irrespective of operator or transport mode." It's seen as essential to a unified Metro network, and it is acknowledged that integrated ticketing is not the same as a Smartcard or electronic purse (see below).

4.5 Sewta believes that to be effective, integrated ticketing must have the form of a simple, single integrated ticketing system, similar to London or the German *Verkehrsverbünde.* It must be a single system, with a full range of tickets, valid on all public transport services without exception, at a fare level similar to current single-operator tickets. The introduction of a limited range of highly or premium-priced through-tickets with a restricted validity, limited use, limited purchasing opportunities, which are difficult to publicise, will not deliver integrated ticketing or integrated public transport.

4.6 Businesses as well would benefit from improved public transport integration. An integrated ticketing system would allow the development of job tickets[7] through reduced demand for parking, reduction of business travel costs and a wider labour market.

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[6] The Benefits of Simplified and Integrated Ticketing in Public Transport, Passenger Transport Executive Group, October 2009. www.pteg.net/NR/rdonlyres/EACFCEE0-F212-467F-B342-2B9B9538DEED/0/integratedticketingreport221009.pdf

[7] Job tickets are monthly or annual all-operator all-mode season tickets, purchased en block from a regional transport authority by employers for use by their staff. These are typically bulk purchased at a large discount on the price of

**Best practice example: Hamburger Verkehrsverbund:**

The *Hamburger Verkehrsverbund* (HVV – Hamburg Transport Alliance) is responsible for public transport network development, ticketing and marketing in the City of Hamburg and its hinterland, a region of 8616 $km^2$ with a population of 3.4 million. Its tickets are valid on all public transport services in the region, including regional trains, three rapid transit/Metro systems, and buses and ferries run by numerous operators.

No other tickets can be purchased on any local services – in other words every ticket bought on any bus or local ticket machine is automatically integrated and valid on any other buses, train or ferry.

The HVV also offers a complete range of tickets including single tickets, one-day tickets, monthly tickets, students' tickets, group tickets, and a number of specials. Yet the system is very simple, and all fares for all standard tickets can be shown on a single flyer:

individual season tickets; for large organisations other special benefits are arranged such as new bus routes to connect employment sites.

## EINZEL- UND TAGESKARTEN

*Fahrkarte gilt auf allen Linien im HVV, egal ob Sie mit Bus, Bahn oder Hafenfähre unterwegs sind. HVV-Fahrkarten sind bereits entwertet.*

### eigen Sie ein

#### Einzel- und Tageskarten

**Einzelkarten** | 1 Fahrt für alle, die nur ab und zu mit uns fahren. Steigen Sie ein, um, aus – und wieder ein! Auf dem direkten Weg zum Ziel ist alles erlaubt.

-> 1 Fahrt, zum sofortigen Fahrtantritt, keine Rund- und Rückfahrten, nicht übertragbar

**Kurzstrecke** | Kurze Fahrten zum kleinen Preis – im Großbereich.

-> 1 Fahrt, zum sofortigen Fahrtantritt, ohne Umsteigen, nicht übertragbar

**Tageskarten** | 1 Tag oder auch 3 Tage unterwegs, so oft Sie wollen. Die 9-Uhr-Tageskarte z. B. lohnt sich häufig schon für 2 Fahrten. Gemeinsam sparen mit der 9-Uhr-Gruppenkarte: Bis zu 5 Personen beliebigen Alters fahren 1 Tag lang zum Pauschalpreis. Das rechnet sich oft schon zu zweit.

-> beliebig viele Fahrten, übertragbar, gültig bis 6 Uhr des folgenden Morgens (Betriebsschluss)

#### Zeitkarten | Abo

Für alle, die regelmäßig mit uns fahren, gibt es Wochen- und Monatskarten zum Sparpreis. Ausgeschlafene bevorzugen die günstige CC-Karte. Die Monatskarten gibt's auch im Abo: 12 Monate fahren und nur für 10 bezahlen. Das HVV-Abo können Sie jederzeit ändern und zu jedem Monatsende kündigen.

#### Fragen zu Fahrkarten?

In den HVV-Servicestellen beraten wir Sie gern. Hier bekommen Sie auch Wertmarken, Abo-Bestellscheine, Berechtigungsnachweise für Schüler, Studierende und Auszubildende sowie kostenlose Infoprospekte. Die Adressen finden Sie unter www.hvv.de.

#### Hamburger Familienpass | Sozialkarte

Ermäßigung durch die Freie und Hansestadt Hamburg von 5 € | pro Person | im Monat | auf HVV-Monats-, Abo-Karten oder ProfiCards für Hamburger. Infos dazu unter www.familienpass.hamburg.de oder www.sozialkarte.hamburg.de.

**Einzel- und Tageskarten**

| Bereiche | Einzelkarte 1 Person | 9-Uhr-Tageskarte* 1 Person + 3 Kinder (6–14 Jahre) | Ganztageskarte 1 Person + 3 Kinder (6–14 Jahre) | 9-Uhr-Gruppenkarte* bis zu 5 Personen | 3-Tage-Karte 3 Tage ab Beginntarif, 1 Person | Einzelkarte Kind (6–14 Jahre) | 9-Uhr-Tageskarte* Kind (6–14 Jahre) |
|---|---|---|---|---|---|---|---|
| Großbereich | 2,60 | 5,10 | 6,00 | 8,60 | 15,00 | 0,95 | 1,80 |
| 1–2 Ringe | 2,60 | 5,10 | 6,00 | 8,60 | – | 0,95 | 1,80 |
| 3 Ringe | 4,20 | 8,20 | 9,10 | 13,00 | – | – | – |
| 4 Ringe | 5,50 | 10,20 | 12,00 | 17,20 | – | – | – |
| Gesamtbereich | 6,90 | 13,20 | 15,00 | 21,60 | – | 1,90 | 3,60 |
| **Kurzstrecke** nur Großbereich ohne Haltestellenaushang | 1,30 | | | | | | |
| **Nahbereich** nur Großbereich ohne Haltestellenaushang | 1,65 | | | | | | |
| **1 Zone** außerhalb Großbereich | 1,60 | | | | | | |
| **2 Zonen** außerhalb Großbereich | 2,10 | | | | | | |

* mo – fr von 9 Uhr bis 6 Uhr des folgenden Morgens (Betriebsschluss), sa, so + feiertags ganztägig

| | | |
|---|---|---|
| **Zuschlag SchnellBus/1. Klasse** | im Gesamtbereich bei Einzelkarten pro Fahrt, bei Tageskarten pro Tag | 1,30 |
| **Kurzfahrt SchnellBus** | nur innerhalb Großbereich | 1,65 |
| **Stadtkarte** [1] | eine Fahrt, inkl. SchnellBus/1. Klasse, siehe Haltestellenaushang | 1,15 |

[1] **Die Stadtkarte** gilt im Citygebiet von Buxtehude, Lüneburg und Stade sowie innerhalb von Bad Bramstedt, Bad Oldesloe, Bad Segeberg, Elmshorn, Geesthacht, Mölln, Ratzeburg, Reinfeld, Schwarzenbek, Uetersen/Tornesch, Wahlstedt und Winsen (Luhe).

## ZEITKARTEN

**Zeitkarten Monat | Abo**

| Bereiche | Woche: Wochenkarte | Allgemeine Karte: Monat | Allgemeine Karte: im Abo | CC-Karte inkl. SchnellBus [1]: Monat | CC-Karte inkl. SchnellBus [1]: im Abo | Auszubildende + Studierende: Monat | Auszubildende + Studierende: im Abo | Senioren [2]: Monat | Senioren [2]: im Abo |
|---|---|---|---|---|---|---|---|---|---|
| 1 Zone nur außerhalb Großbereich | 10,90 | 41,50 | 34,00 | 30,00 | 24,60 | 32,50 | 26,60 | 30,00 | 24,60 |
| 2 Zonen | 14,10 | 54,00 | 44,10 | – | – | 41,00 | 33,50 | – | – |
| 3 Zonen | 19,80 | 74,00 | 60,10 | 32,50 | 26,60 | 56,50 | 45,90 | – | – |
| 4 Zonen oder Großbereich | 22,50 | 85,00 | 69,00 | 46,50 | 38,40 | 64,00 | 51,90 | 46,50 | 38,40 |
| 5 Zonen oder Großbereich + 1 Zone | 26,90 | 103,00 | 83,80 | – | – | 77,50 | 63,10 | – | – |
| 6 Zonen oder Großbereich + 2 Zonen | 32,80 | 126,00 | 102,60 | 61,00 | 50,00 | 94,50 | 77,10 | 61,00 | 50,00 |
| 7 Zonen oder Großbereich + 3 Zonen | 38,80 | 148,00 | 121,30 | – | – | 111,00 | 91,00 | – | – |
| Gesamtbereich | 44,80 | 170,00 | 138,00 | 73,00 | 59,90 | 128,00 | 103,80 | 73,00 | 59,90 |
| **Zuschlag für SchnellBus/1. Klasse** [1] | | | | | | | | | |
| Gesamtbereich | 9,50 | 35,00 | 29,10 | 18,00 | 14,60 | 35,00 | 29,10 | 18,00 | 14,60 |

1) **CC-Karten** inkl. SchnellBus sind gültig für 1 Person + 3 Kinder (6–14 Jahre), mo – fr von 9 – 16 Uhr und von 18 Uhr bis 6 Uhr des folgenden Morgens (Betriebsschluss), sa, so + feiertags ganztägig; **Zuschlag** gilt für 1. Klasse ⊕-Bahn
2) **Seniorenkarten** sind gültig für 1 Person ab 63 Jahre, mo – fr von 9 Uhr bis 6 Uhr des folgenden Morgens (Betriebsschluss), sa, so + feiertags ganztägig

**Für alle Zeitkarten:** Zuschlag SchnellBus/1. Klasse pro Fahrt 1,30 € (gültig im Gesamtbereich)

**Kinderlieb** Die Kleinen unter 6 Jahren fahren kostenlos.

**Zeitkarten für Schüler**

| Bereiche | Hauptkarte: Monat | Hauptkarte: im Abo | Geschwister-Nebenkarte: Monat | Geschwister-Nebenkarte: im Abo |
|---|---|---|---|---|
| 1 Zone nur außerhalb Großbereich | 32,00 | 26,20 | 23,50 | 19,30 |
| Großbereich, Kreis oder 2 Zonen (nur kreisübergreifend) | 39,50 | 32,30 | 31,00 | 25,10 |
| Gesamtbereich | 56,00 | 45,90 | 43,50 | 35,70 |
| **Zuschlag für SchnellBus/1. Klasse** | | | | |
| Gesamtbereich | 35,00 | 29,10 | 35,00 | 29,10 |

**Zeitkarten für Kinder** 6 Jahre

| Bereich | Monat | im Abo |
|---|---|---|
| Gesamtbereich | 28,00 | 22,90 |
| **Zuschlag für SchnellBus/1. Klasse** | | |
| Gesamtbereich | 35,00 | 29,10 |

**Ergänzungskarten**

| | |
|---|---|
| Großbereich oder 1–2 Ringe | 1,60 |
| 3 Ringe | 3,20 |
| Gesamtbereich | 4,80 |
| Kind Gesamtbereich | 0,95 |

Für 1 Fahrt außerhalb des örtlichen Geltungsbereiches einer Zeitkarte

**Geltungsdauer für Zeitkarten** Wochenkarten gelten jeweils von Montag 0 Uhr bis 12 Uhr des ersten Werktags der folgenden Woche. Monatskarten gelten ab 0 Uhr des Monatsersten bis Betriebsschluss des ersten Werktags (mo – fr) im Folgemonat. Betriebsschluss ist um 6 Uhr am folgenden Morgen.

**Übertragbarkeit** Zeitkarten sind nicht übertragbar. Es gelten die Bestimmungen des HVV-Gemeinschaftstarifs. Diese können in den Servicestellen und unter www.hvv.de eingesehen werden.

**Vorverkauf** Alle Zeitkarten gibt es bis zu 2 Monate im Voraus.

Current state of integrated ticketing

4.7 In South East Wales every bus operator has its own ticketing system and fare structure. Some of these are fairly simple. For example Cardiff Bus and Newport Bus effectively use a flat fare system within the respective city limits, but others are less simple for users to understand. The local rail system has its own separate (mostly zonal) fares system. There are also numerous limited multi-bus operator and multi-modal tickets, add-ons and examples of through-ticketing. There are one-day and weekly bus network riders[8], PlusBus rail & bus tickets, Caerphilly, Rhondda and Aberdare bus plus rail tickets, RailLink bus services, further rail and bus rover, ranger, explorer and flexi-passes, as well as numerous local agreements where one operator accepts tickets (e.g. return tickets) issued by other operators (especially where evening services are provided under contract by a different operator).

4.8 Because of competition issues, the vast majority of these operate as through-tickets (where the 2nd operator simply accepts the tickets of the first operator without financial compensation) or add-ons (where the 2nd operator receives a set additional amount that is added to an existing ticket by the 1st operator). There are no multi-operator travel cards, where revenue is shared by passenger journeys or passenger miles.

4.9 There is currently no day, weekly or longer season ticket that is valid on all bus and rail operators in south east Wales. For most trips involving more than one operator (whether bus-bus or bus-rail), it is not possible to purchase a single through ticket. However, where they exist, they are typically more expensive than the fare for an equivalent journey of the same distance with a single operator. In summary, existing commercial through-ticketing / integrated ticketing arrangements are limited, and can be confusing and expensive.

4.10 The principal example of integrated bus ticketing in Wales is provided through the All Wales Concessionary Fare scheme, which enables eligible users to use any local bus service. This is however a fully supported scheme, which bypasses the competition or commercial risk elements associated with commercial operations.

Delivering fully integrated ticketing

4.11 Sewta supports a single integrated ticketing system for the regional public transport network[9] and is planning to develop proposals for integrated ticketing across the region. Through the Welsh National Transport Plan (NTP), the Welsh Government has made a commitment to introduce a Welsh Transport Entitlement Card for bus and rail services ('*Go Cymru*'). According to the NTP, this "would include integrated ticketing, to allow 'seamless' transfer between services and operators, by 2014". It is currently being developed as an e-purse, which will facilitate cashless purchase, rather than offer an integrated ticket, and for buses only. A pilot scheme, which is centred on Newport and valid on Newport Bus and Cardiff Bus, is currently under way[10].

[8] although eligibility between operators varies on daily and weekly products, limiting their usefulness and increasing complexity

[9] See Sewta Regional Transport Plan Policy IIP1

[10] In Sewta, Cardiff Bus and Newport Bus have also introduced commercial smart ticket products (marketed as the Iff Card and Freedom Card respectively), but these are restricted to their own networks of services, currently offer no discounts and are effectively an e-purse.

4.12 There are however a number challenges to introducing fully integrated ticketing. Firstly, a fares and ticketing system would need to be developed, identifying available tickets, ticketing structure, fare zones / stages, fares levels, central processing, revenue distribution / reimbursement mechanism, sales / purchase mechanisms, management costs, etc[11]. Any such scheme would need to be planned carefully, so as to not fall foul of competition legislation, and to take account of conditions that apply to public transport ticketing schemes. Consultation with operators and the competition commission would be essential. These tasks have some resource implications, and whilst Sewta aims to take these issues forward, it has had no funding for the development or implementation of non-capital interventions since 2010.

4.13 A further issue is to ensure universal acceptance at a fare similar to current single operator fares. Concerning bus services, there may be an opportunity to make membership of such a scheme a condition of payments under the Regional Transport Services Grant, the proposed successor to Local Transport Services (LTSG) and the Bus Services Operating Grant (BSOG – the old fuel duty rebate). These are likely to be rerouted via the Regional Transport Consortia from April 2013. However, whilst this provides an opportunity to instigate change, it is unfortunate that grant levels are at the same time being reduced by 25%, which is expected to lead to substantial upheaval in terms of fares increases, deregistration by bus operators and fewer council-supported services. It is therefore difficult to see how a new integrated ticketing system can be introduced as an additional grant condition for some time, until financial conditions improve and a more proactive funding regime is in place, that can be used to encourage and pump prime such initiatives. Concerning rail services, it would be absolutely essential that membership of the scheme is a condition of the next Wales rail franchise, and other rail franchises operating into Wales.

[11] An important consideration is the requirement by the Financial Services Authority surrounding multi agency / operator ticketing scheme that holds cash deposited by passengers. This will be addressed by the Welsh Government when the Go Cymru scheme is rolled out nationally, but one barrier for operator participation may be the fees associated with each transaction.

## 5. High-quality interchanges

Background

5.1 Public transport interchanges provide a central focus and point of integration for public transport services. Changing between bus and rail services is essential to complete many journeys by public transport. However there is an inherent dislike by passengers of the need to change service and/or mode. In particular, the inconvenience that such changes cause compared to a direct journey – known as the 'interchange penalty', is a factor that works against the shift from private to public transport.

5.2 The quality and safety of the facilities provided at interchanges is therefore a key influence on the passenger perception of public transport services. It needs to be addressed in order to ensure that the negative impact of the 'interchange penalty' is not further exacerbated. From a passenger point of view, interchanges must be designed to reflect the three main activities they may wish to carry out there; that is to move between one service or mode and another, to wait for their next service and to use the time that they spend waiting or transferring to carry out other daily activities (such as buying a coffee or newspaper or using a cash machine). Key elements of seamless interchange include:

- Good feelings of personal security (through staffing, open layout, good lightning), especially outside core hours,
- Provision of accurate, well-placed, easy-to-use signage and information,
- High quality waiting facilities, including protection from the elements, seating, lighting, toilets, ticket purchase and refreshments.
- Good pedestrian access
- Cycle parking facilities

5.3 High quality interchanges are also always public transport hubs, and as such will also help to meet the social, economic and environmental needs of an urban area, including:

- Supporting the continued economic development of the local area and acting as a catalyst for socio-economic and physical regeneration in local communities
- Minimising the need to travel, by concentrating new jobs and homes around accessible locations
- Improving access to facilities and services, and providing links between neighbourhoods and employment, education and other opportunities
- Removing barriers which prevent disabled people and others with reduced mobility from travelling freely and
- Creating more attractive buildings and public spaces, improving personal safety and security, and enhancing the urban realm and creating a 'sense of place'

**Best practice example: Blackwood Interchange**

Blackwood bus station is a key hub within the regional bus network. A review of the previously existing interchange had identified a number of weaknesses, which contributed to low levels of user satisfaction with facilities and levels of security. A comprehensive redevelopment of the facility was undertaken, which included major revisions to the layout and the replacement of the existing open waiting area with a high quality station building, including CCTV, enhanced information, toilets and refreshment facilities.

Passenger surveys were undertaken before and after completion of the scheme to identify

the impact on user perception. Respondents were asked to rate key attributes on a 5 point Likert Scale. These were collated and a rating calculated, ranging from -1 (very bad) to +1 (Very Good). A rating of 0 indicating a neutral perception. The results are illustrated below:

| Attribute | Sample Size | Satisfaction before | Satisfaction after | Change |
|---|---|---|---|---|
| Pedestrian Access to/from the station | 506 | 0.39 | 0.61 | +0.22 |
| Integration with other modes | 233 | 0.32 | 0.45 | +0.13 |
| Connections to train station | 190 | 0.36 | 0.55 | +0.19 |
| Waiting areas | 494 | -0.04 | 0.69 | +0.73 |
| Refreshment facilities | 294 | 0.23 | 0.88 | +0.65 |
| Toilet facilities | 301 | -0.03 | 0.60 | +0.63 |
| Timetable Information | 465 | 0.18 | 0.61 | +0.43 |
| Safety and Security | 466 | 0.03 | 0.53 | +0.50 |
| Access on/off boarding platform | 495 | 0.41 | 0.57 | +0.16 |

It was evident the completion of this scheme has resulted in a significant increase in user perception. Since completion, there has also been significant commercial investment in the local bus fleet in terms of quality and frequency. This illustrates the increased confidence in the operator to grow the market, and the ability of publically funded improvements to act as a catalyst for further private investment.

The new interchange also won the Royal Institution of Chartered Surveyors Wales Regeneration Award in 2008.

Current state of interchanges

5.4 In South East Wales, the current picture is very mixed. There are 18 bus stations[12] in the region ranging from recently rebuilt / modernised ones (e.g. Bridgend, Blackwood) to bus stations in need of investment (Cardiff, Merthyr Tydfil). There are also numerous other key interchange points (e.g. rail stations with nearby bus services, major crossroads).

5.5 Since 2010, Sewta has invested about £2.7m in upgrading interchanges. This figure, which excludes park and ride facilities, represents 11% of its total available RTP grant. This figure (and the proportion of total funding) is likely to increase substantially over the next couple of years as major works are planned for Cardiff, Newport, Brynmawr, Merthyr, Abergavenny, Severn Tunnel Junction, Chepstow and other locations. Sewta has also developed an Interchange Best Practice Audit, which sets the standards that Sewta believes is required for interchanges in the region, and has prepared a Bus/Rail Integration Study that focuses on strategic opportunities for improved physical interchange.

Delivering high-quality interchanges

5.6 Sewta supports further improvements and expansion of public transport interchanges facilities. It is likely that in the next few years, we will spend a substantial proportion of our capital funding on interchange projects. The National Transport Plan (NTP) also commits

[12] Aberdare, Abergavenny, Bargoed, Blackwood, Bridgend, Brynmawr Caerphilly, Cardiff, Chepstow, Cwmbran, Ebbw Vale, Merthyr Tydfil, Monmouth, Newport, Pontypridd, Talbot Green, Tonypandy, Tredegar

the Welsh Government to "Create a series of strategic modal interchanges (by 2014)"[13] This commitment was highlighted in the reprioritisation of the NTP in summer 2011.

5.7 The key issue with delivering high-quality interchanges is funding. Overall capital funding for regional/local transport schemes has fallen by 79% compared to the 2004/09 average, and is now running at less than 33% of even the do minimum set out in the South East Wales Regional Transport Plan. As a consequence, it will not be possible to deliver many of the schemes proposed.

5.8 Sewta also believes that, given the Welsh Government's commitment to deliver strategic modal interchanges by 2014, and the fact that both Cardiff and Newport are identified as 'Key Settlements of National Significance' in the Wales Spatial Plan[14], the delivery of high quality transport interchanges in these two places should be identified in and funded through the Welsh Government's National Transport Plan programme.

5.9 Another key issue is integration of interchanges in regeneration schemes. As we said in our response to the Assembly's Enterprise & Learning Committee 2011 Inquiry into the Regeneration of Town Centres, it is essential that key interchanges must be identified in all city and town centres as a priority, and that good quality interchange facilities should be required as core components of all regeneration / redevelopment schemes, and not as an afterthought. There is a danger that transport facilities are overlooked on such schemes, especially if there is no pressure from the funding bodies or policy frameworks that these facilities have to be provided. It would be good if the NTP could flag up city and town centres as a priority for improving interchange, and provide additional transport funding, to ensure good quality interchange facilities are provided at the same time as regeneration. Indeed it would have been helpful if intervention 7 of the NTP ('Create a series of strategic modal interchanges by 2014'), could be taken forward, and supported by a list of sites to be (re-)developed or further information on the location of proposed strategic modal interchanges.

5.10 Interchange development is also taken forward as part of the development of the Sewta Metro Plus proposals, which looks at co-location of interchange facilities.

[13] National Transport Plan intervention 7, NTP page 3

[14] Wales Spatial Plan 2008 Update, The National Vision, page 28

## 6. Timetable coordination

Background

6.1 At the most basic level, passenger transport integration means that the routes of bus services should be planned in such a way that they call at local stations and meet other bus routes, and that their timetables are set so that passengers can interchange between rail and bus or bus and bus without lengthy waiting times. Public transport integration utterly relies on timetable coordination to function. In practice, this means all services should be planned as a network, trunk services first[15], with more local services taking account of the area served and the timetables, and planned accordingly.

6.2 This is the method used in networks commonly seen as highly integrated, such as London, or most continental European cities. The 1985 Transport Act, the current legislative framework for provincial Britain, on the other hand, does not prioritise timetable co-ordination in any way, replacing it with a more consultative approach.

6.3 Despite the development of Quality Bus Contracts and statutory Quality Bus Partnership schemes, UK competition policy is still seen as a key deterrent to inter-operator co-ordination of timetabling (and ticketing)[16]. The 2010-2012 Competition Commission market inquiry into Local Bus Services also chose to take a strong line on promoting bus-on-bus competition rather than supporting passengers' clear preference for integrated urban public transport. Sewta's evidence to the Competition Commission, having experienced some of the most damaging bus wars in the late 1980's and early 1990's, was based on the need to deliver co-ordinated competition through voluntary partnership arrangements.

**Best practice example – Rail-link bus services:**

There are a number of dedicated, fast and convenient rail-link bus services in South East Wales, connecting settlements without rail access to the nearest stations. These have timetables fully integrated with the train services. Unfortunately they require a high degree of subsidy, cannot be used for local (bus-only) trips, and often parallel existing bus routes. A number of rail-bus links have been discontinued over the last few years for financial reasons.

Mondays to Saturdays except Bank Holiday Mondays
Dydd Llun i Ddydd Sadwrn ac eithrio Gwyliau'r Banc

rail Linc / Linc trên

| to Cardiff... | | | | | | | | | | | | | | | i Gaerdydd... |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Blackwood interchange (stand 4) | 0620 | 0650 | 0745 | 0900 | 1000 | 1100 | 1200 | 1300 | 1400 | 1500 | 1600 | 1700 | 1800 | 1940 | Coed Duon cyfnewidfa (cilfach 4) |
| Bryn Derw | 0624 | 0654 | 0750 | 0905 | 1005 | 1105 | 1205 | 1305 | 1405 | 1505 | 1605 | 1705 | 1805 | 1945 | Bryn Derw |
| Pontllanfraith council offices | 0628 | 0658 | 0755 | 0910 | 1010 | 1110 | 1210 | 1310 | 1410 | 1510 | 1610 | 1710 | 1810 | 1950 | Pontllan-fraith swyddfeydd y cyngor |
| Maesycwmmer shops | 0632 | 0702 | 0800 | 0915 | 1015 | 1115 | 1215 | 1315 | 1415 | 1515 | 1615 | 1715 | 1815 | 1955 | Maes-y-cwmwr siopau |
| Ystrad Mynach station linc point | 0636 | 0706 | 0805 | 0920 | 1020 | 1120 | 1220 | 1320 | 1420 | 1520 | 1620 | 1720 | 1820 | 2000 | pwynt linc gorsaf Ystrad Mynach |
| Ystrad Mynach station | 0638 | 0713 | 0813 | 0928 | 1028 | 1128 | 1228 | 1328 | 1428 | 1528 | 1628 | 1728 | 1828 | 2010 | gorsaf Ystrad Mynach |
| Llanbradach station | 0643 | 0718 | 0818 | 0933 | 1033 | 1133 | 1233 | 1333 | 1433 | 1533 | 1633 | 1733 | 1833 | 2015 | gorsaf Llanbradach |
| Aber station | 0647 | 0722 | 0822 | 0937 | 1037 | 1137 | 1237 | 1337 | 1437 | 1537 | 1637 | 1737 | 1837 | 2019 | gorsaf Aber |
| Caerphilly station | 0650 | 0725 | 0825 | 0940 | 1040 | 1140 | 1240 | 1340 | 1440 | 1540 | 1640 | 1740 | 1840 | 2022 | gorsaf Caerffili |
| Lisvane and Thornhill station | 0654 | 0729 | 0829 | 0944 | 1044 | 1144 | 1244 | 1344 | 1444 | 1544 | 1644 | 1744 | 1844 | 2026 | gorsaf Llysfaen a Draenen Pen-y-graig |
| Llanishen station | 0656 | 0731 | 0831 | 0946 | 1046 | 1146 | 1246 | 1346 | 1446 | 1546 | 1646 | 1746 | 1846 | 2028 | gorsaf Llanisien |
| Heath High Level station | 0659 | 0734 | 0834 | 0949 | 1049 | 1149 | 1249 | 1349 | 1449 | 1549 | 1649 | 1749 | 1849 | 2031 | gorsaf Lefel Uchel y Mynydd Bychan |
| Cardiff Queen Street station | 0704 | 0739 | 0839 | 0954 | 1054 | 1154 | 1254 | 1354 | 1454 | 1554 | 1654 | 1754 | 1854 | 2039 | gorsaf Caerdydd Heol y Frenhines |
| arrive Cardiff Central station | 0709 | 0744 | 0847 | 0959 | 1059 | 1159 | 1259 | 1359 | 1459 | 1559 | 1659 | 1759 | 1859 | 2047 | gorsaf Caerdydd Canolog cyrraedd |
| depart Cardiff Central station | 0710 | 0746 | | 1001 | 1101 | 1201 | 1301 | 1401 | 1501 | 1601 | 1701 | 1801 | 1901 | | gorsaf Caerdydd Canolog gadael |
| Grangetown station | 0714 | 0750 | | 1005 | 1105 | 1205 | 1305 | 1405 | 1505 | 1605 | 1705 | 1805 | 1905 | | gorsaf Grangetown |
| Dingle Road station | | 0756 | | 1011 | 1111 | 1211 | 1311 | 1411 | 1511 | 1611 | 1711 | 1811 | 1911 | | gorsaf Heol Dingle |
| Penarth station | | 0801 | | 1016 | 1116 | 1216 | 1316 | 1416 | 1516 | 1616 | 1716 | 1816 | 1916 | | gorsaf Penarth |

ARRIVA Trains Wales / Trenau Arriva Cymru

On Mondays to Fridays, rail linc also calls at Pontllanfraith House Reception 1 minute before the times in red.
Ar Ddyddiau Llun i Ddyddiau Gwener, mae'r linc trên hefyd yn galw yn Nerbynfa Tŷ Pontllan-fraith 1 munud cyn yr amserau mewn coch.

[15] Mainly rail services, but also high-frequency / core bus routes
[16] See for example, Factors Affecting the Decline of Bus Use in the Metropolitan Areas, PTEG, April 2008.

Current state of timetable coordination

6.4 There are a number of well integrated services in South East Wales. In addition to the Rail-link bus services (see box above), there are also a number of other well integrated services, such as the connection at Pontypool between Stagecoach routes X3 (Cardiff – Pontypool) and X33 (Pontypool – Abergavenny), which are guaranteed with through fares are available.

6.5 But overall there is very little timetable integration, and buses often compete with trains. For example, since the demise of the special Rail-link service, the X18 from Ebbw Vale to Newport arrives at the nearest stop to Ebbw Vale Parkway station at xx.17, with the train leaving at xx.40. In the opposite direction trains arrive at xx.31 and buses depart at xx.47. The X15 from Brynmawr and Abertillery to Newport even manages to arrive at Llanhilleth station three minutes *after* the train has departed and leaves six minutes before the Cardiff train is due. The reality is of course that because of the lack of integrated ticketing and the availability of through bus services to many of the destinations served by the trains, connections with trains are currently not a priority for many (existing or potential) passengers.

Delivering timetable coordination

6.6 Sewta believes that a major factor in the lack of timetable co-ordination is the fear of competition issues and possible fines from the Competition Commission. Sewta supports the introduction of a more efficient and effective bus regulatory system[17] to enable regional transport consortia and local authorities to ensure the proper planning of a well co-ordinated public transport network. Sewta will continue to work in partnership with the operators to this end, and the changes emerging from the Bus Funding Review in Wales are anticipated to increase these opportunities. It is also noted that the rail network is operated in a regulated environment, whilst buses operate in a de-regulated, commercial environment; therefore there are fundamental legislative differences in schedule planning.

[17] See RTP policy BUP3 (section 4.8)

6.7 The increased role for the regional transport consortia in managing the distribution of bus funding will require the strengthening of current public sector passenger transport units[18], which has resource implications for the consortia. Central to the current discussions on the future of bus funding[19], the consortia together with their local authorities are being asked to develop bus network strategies, and provide an overview of the existing network together with objectives and priorities for the network. Timetable co-ordination is therefore likely to feature very strongly in the establishment of a mechanism to implement such network strategies, and additional funding from the Welsh Government to facilitate their preparation will be needed.

6.8 Demand for interchange is likely to be constrained, if timetable coordination alone is implemented, and there is no ticketing integration, as interchange trips would continue to cost substantially more than single-operator trips. The two aspects of integration need to be fully integrated. The relatively low level of current demand for bus / rail integration is illustrated by the results of bus passenger surveys carried out in Cardiff City centre during 2008. Of the 2,251 respondents stating their origin, 3.6% identified Cardiff Central Railway Station and 3.8% Cardiff Bus Station.

[18] Passenger transport units are currently more geared towards filling gaps in the network through procuring additional services than managing overall networks.
[19] See paragraph 2.12 above

## 7. Integrated public transport information

Background

7.1 The provision of accurate information is essential to delivering integrated public transport. The best public transport service will not be used without information, signposting its benefits and detailing how to use it. For integrated public transport to work, the information must show that services are integrated into one network. Because of the inherent increased degree of uncertainty of undertaking multi-leg trips, the information must also be consistent, reliable and repeated both throughout a journey and throughout the transport system.

7.2 The availability of reliable, accurate, accessible and timely information can help to improve the image and attractiveness of public transport, and helps to ensure journeys involving an interchange are easy and convenient. Good information about public transport services enables passengers to know their options and make informed decisions, removing uncertainty and increasing passenger confidence.

Best practice example: London Transport Journey Planning Apps

In autumn 2011 Transport for London made the data of the real time information systems for its bus, tube and train services available online. There are now a number of journey planner apps for mobile phones that use the real time data, and thus enable passengers to plan trips with a high degree of confidence in the offered connections, as well as checking and updating their travel plans throughout the trip.

An example can be found at http://londontransportapp.com/.

Current state of information

7.3 Public transport information in South East Wales lacks consistency and can be inadequate. Whilst some clear high-quality information is produced by Traveline Cymru, operators and local authorities, there remain considerable gaps. In some parts of the region, timetable information (both electronic and printed) is patchy and/or of poor quality. Fares information is even more limited, and too many bus stops display no information at all. Even where quality information exists, it is not consistent across the region, and can be difficult to obtain.

7.4 Integrated public transport information is in particular mixed. The Traveline Cymru Journey Planners, now available as a mobile phone app, incorporate all modes and provide multi-modal trip suggestions. But too many timetables of bus routes do not even make reference to the rail stations they serve, too many bus stops at railway stations do not even have the same name as the station, and rail station information on buses is too often non-existent.

Delivering integrated public transport information

7.5 Sewta supports consistent high quality standards for public transport information provision across the region[20], for all modes and all services. The NTP also commits the

[20] See RTP policy IIP3 (section 4.10)

Welsh Government to “Improve the provision of effective transport information, including personal travel planning sites and at-stop information, by 2011”[21].

7.6 Sewta has previously undertaken an at-stop bus information programme. We are now proposing to work with Traveline Cymru and bus and train operators to extend the programme to include all modes and all types of information necessary for passengers. As set out in the RTP, Sewta is planning to review existing public transport information and to identify existing good practice. This should form the basis to create a consistent standard for all timetable brochures, displays, maps, etc, based upon best practice examples, and to develop a comprehensive and costed multi-modal regional public transport information strategy, which will set out the proposals and the delivery arrangements.

7.7 These tasks have some resource implications. Again, there is the problem that since 2010 Sewta had no funding for the development or implementation of non-capital interventions. Some of the funding of the proposed Regional Transport Services Grant (see above) may be used for provision of integrated information, but in the context of a 25% cut in funding for 2013/14, when compared with 2011/12, this is likely to be very limited. Another avenue may be through the development of a bus information scheme under the Transport Act 2000, though funding to include multi-modal information would be restricted. To our knowledge, no bus information schemes under the Transport Act 2000 exist in Wales. Concerning rail services, it would be helpful if the next franchisees would be required to provide high-quality multi-model public transport information, including the use of new technologies, such as apps and real time information.

[21] National Transport Plan intervention 14, NTP page 3

## 8. Integration at planning level

A further, equally important issue to bring about an integrated public transport system is integration at planning level – that is combined development between spatial planning strategies and transport strategies.

The interactions between land use and transport cannot be overestimated – transport investment facilitates development, while planning decisions strongly influence the demand for transport. Consequently the Sewta Regional Transport Plan contains a number of planning policies, and most spatial and economic development strategies (Wales Spatial Plan, Local Development Plans, the City Region proposal and the "Vibrant and Viable Places" regeneration consultation) make strong references to transportation issues.

As confirmed by the Independent Advisory Group reviewing Planning in Wales, and chaired by John Davies, there is a lack of coherent, robust and up-to-date regional spatial planning framework in Wales. The lack of proper strategic regional development planning means that there is a danger that large scale development goes ahead without the necessary public transport improvements, or at sites where such improvements cannot be delivered, which would have substantial negative consequences for the transport system of the whole region, and for the wider economic, social and environmental aspirations for the region.

Recently the issue has been given further prominence by challenges arising from the emerging Local Development Plans, in particular those facing the Cardiff LDP. Cardiff clearly plays a critical role in the region, but at the LDP Inquiry only proposals within its borders can be considered. A Regional Development Framework, developed together with an updated Regional Transport Plan, would enable future development to be targeted where it could be best served by public transport; and future transport interventions to be targeted where they are most needed across the region.

It is very difficult to develop a functioning integrated public transport system across the region as long as, for example, housing allocations are determined by individual local authorities (and thus must be catered for within each local authority boundaries), instead of regionally (and thus could be planned to optimise public transport accessibility to jobs, shopping, leisure, etc).

## 9. Further comments & conclusion

9.1 The response outlines what Sewta believes are the elements necessary for an, integrated public transport system, the work Sewta is already undertaking, and the further steps necessary to deliver it.

In its terms of reference, the committee also touched on a number of further issues, which we would like to address.

| Issue | Sewta comment |
|---|---|
| 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?<br><br>How successful are Regional Transport Consortia in supporting the provision of effective, integrated public transport? | The establishment of regional transport consortia, and the development of Regional Transport Plans, have provided improved focus on planning integrated public transport. The likely regionalisation of bus funding together with increased collaboration between local authorities should further this process. However, the current regulatory framework for bus services continuous to work against integrated public transport services that meet the needs of Welsh travellers. |
| 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? | The Welsh Transport Strategy and the NTP clearly set out the Welsh Government's support for integrated public transport. It would be helpful however if further information could be made available of how NTP intervention 7 ('Create a series of strategic modal interchanges by 2014') could support the consortia's PT interchange work, and how the current Go Cymru electronic purse could be expanded into a fully integrated ticketing system in line with NTP intervention 6 ('Introduce a Welsh Transport Entitlement Card for bus and rail services, which would include integrated ticketing, to allow 'seamless' transfer between services and operators, by 2014')<br><br>Concerning the issue of Joint Transport Authorities, Sewta believes that additional powers and resources would be needed at the regional level to deliver a more ambitious regional transport programme. Governance arrangements should be built on those already in place at the South East Wales level, and will need to be tailored to be appropriate for Wales[22].<br><br>Operating the Wales and Borders rail franchise on a not-for-dividend basis may offer opportunities for increased integration between rail and bus |

[22] See also Sewta Board report on "A Metro for Wales's Capital City Region – Sewta Metro Plus" from March 2012 and "City-Regions Final report – A Response from Sewta" from September 2012.

| | |
|---|---|
| | services. However, it is important that public transport integration requirements are set down in the franchise specification, whatever framework is eventually chosen for operating the new franchise. Furthermore, Wales still has a number of other rail franchises which enter the country, and perhaps the Welsh Government should, for example, require the inter-city franchises to sign up to be part of the Wales National Transport Entitlement Card System.<br><br>Quality partnerships can be useful tools for improving the quality of bus services, including issues related to integration. However they typically exclude ticketing, and as they do so their effect on integration will always be limited. Quality Bus Contracts are very much a measure of last resort, as they require any local authority to undertake substantial work to show that it's objectives cannot be delivered otherwise – indeed there is currently not a single Quality Bus Contract operational in the UK. Furthermore, both relate to bus only, in South East Wales public transport integration must include both buses and trains. |
| What innovative approaches to delivery of public transport in Wales might be considered to improve integration? | Sewta believes that the best way to deliver public transport integration is to replicate successful best practice examples. |
| How effectively do key stakeholders, particularly transport operators and public bodies, cooperate to ensure effective service delivery? | Stakeholders operate as effectively as they are able within the current legislative arrangements. The main barrier is competition legislation which prevents collusion – inherently restricting opportunities to co-ordinate. |
| How can the creation of a Network Rail Wales devolved route support effective, integrated public transport in Wales? | The creation of a Network Rail Wales devolved route may provide opportunities to provide dedicated rail feeder services as part of the franchise requirements. |

<u>Conclusion</u>

9.2 In evidence-taking sessions, the committee will hear many comments on the bus and rail services in Wales, and the integration of public transport services. As in Sewta's submission, there will be examples of good practice, of which there are many, and there will be examples of bad practice. However, the best way to judge what is happening is to stand in the street. If you stand in Dumfries Place in Cardiff or at Abergavenny railway station, and observe the bus and rail services, then do the same thing in Swansea, Wrexham, Liverpool or Birmingham, you will see a standard of integration and service delivery that is not consistent in quality. On the other hand, if you go to London or virtually

any city in Spain, Italy, Belgium, France or Germany you will see a standard of service that is palpably better than that in the south of Wales and the rest of the UK. This is a strong way to judge what is happening, and where we should look to learn about a fully integrated public transport network.

9.3 Despite the good examples and recent progress, integration within the public transport system in South East Wales still compares poorly with that in London or equivalent conurbations in continental Europe. Sewta does not believe integrated public transport will deliver a high-quality system on its own. But it is a necessary and essential ingredient, without which a modern, accessible and sustainable transport system that increases opportunity, promotes prosperity for all and protects the environment cannot be delivered.

9.4 Unless a step-change is achieved in public transport integration, Sewta will fail to achieve its vision, the Welsh Government will fail to deliver its commitment to a networked city region in South East Wales, and transport will under-perform in providing accessibility for all, and supporting the Welsh Government's goal of economic growth and increased employment. To conclude, a step change in the availability of funding is required now to achieve the aim of a fully integrated public transport system. Furthermore, greater collaboration between different organisations, including operators, Government and passenger groups, as well as the regional transport consortia and their local authority members, is required to ensure a system that meets the needs of the passenger is delivered.