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South West Wales bus network survey findings



TRAFNIDIAETH CYMRU
TRANSPORT FOR WALES



Llywodraeth Cymru
Welsh Government

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Executive summary

The Welsh Government, local authorities and Transport for Wales (TfW) are working with bus operators and key stakeholders across Wales to reform bus services. In the new scheme, called franchising, decisions about bus services in Wales (including routes, timetables, fares, hours of operation and service quality standard) will be made by Welsh Government and TfW. More information on franchising can be found [here](#).

The first step of bus reform has involved TfW and local authorities jointly develop a proposal for the bus network in South West Wales. We've called this our Proposed Base Network. We can deliver this network within the limits of our current resources.

We sought public feedback on this network in South West Wales between 1 July and 23 September 2025. This report summarises the initial findings of the engagement and the feedback taken and the next steps we will take.

Key findings

We had 662 responses to the online, bilingual survey and 18 submitted on paper between 1 July and 23 September 2025. We also captured views via stakeholder and community workshops and at public drop in-events.

We found that:

- Connecting bus and train services were important to people in South West Wales – 60.0% of respondents would be willing to interchange between buses or trains if it meant they can get to their destination sooner.
- Just over half of the respondents agreed that network changes that improve the level of service for the majority of people should be considered, even if that inconveniences some people.
- 27.0% of respondents thought that our Proposed Base Network for 2027 will be better for South West Wales. 55.8% think it will be the same or aren't sure, and 17.3% think it will be worse.
- Low frequency services and the lack of morning, evening and Sunday services was a common theme.
- It was challenging to capture the views of young people, with just 2.8% of respondents being under the age of 25.

The routes and frequencies for the updated South West Base Network will be finalised with local authority partners by December 2025 and shared in a report. The updated South West Base Network will also be included in the Welsh Bus Network Plan. Collecting public input ensures that we can refine the services operating in South West Wales in 2027.

Approach to engagement

Introduction

Prior to the launch of the public engagement we published [Our commitment to involving communities in South West Wales](#) in June 2025. This outlined our aims to involve communities in future plans for bus services in Wales.

Timeline

Public engagement via our online platform, TfW 'Have Your Say', stakeholder workshops and public drop-in sessions took place between 1 July and 23 September 2025. The engagement and feedback are presented in this initial report.

It is our aim to provide a second report in December 2025 which will include:

- more detail on the findings from the public engagement
- detail on the updated base network,
- how public feedback has shaped this
- the next steps toward franchising bus services in the region and delivering this network in 2027.

On what we engaged

We've used the current network as the starting point to develop our Proposed Base Network and then made some proposed improvements, based on:

- Having a simpler network that is easy to explain, remember and navigate
- High-frequency core routes that can attract the highest patronage
- Interchanges between bus services to enable faster journeys to more possible destinations
- Some more direct services.

We provided the detail on the proposed base network via a series of maps (with a key showing where we proposed changes to routes and/or frequencies) as well as an interactive map and descriptive documents to read through (links to these documents can be found in appendix A). We provided other helpful information such as FAQs, information by the Welsh Government on Bus Reform and ways to contact us (links to this information can be found in appendix A).

We asked people to provide feedback on both specific services and on a general area of choosing, asking questions to understand the impact of any change and for opinions on how and when services should run.

We gathered information and opinions on how we navigate trade-offs such as faster journeys if that means more changes and having buses closer to home even if that means a longer journey.

We also sought general feedback such as how people feel about the proposed base network and if it will make things better or worse.

The survey was hosted digitally and printed out for use at events. See appendix B for the printed version of the survey in full.

Who we engaged

We engaged the stakeholder groups that make up the TfW Advisory Architecture, our network of panels that support, challenge and scrutinise our work. This network is engaged as part of a regular cycle of sessions held bi-monthly or quarterly.

We engaged people across the local authorities of Neath Port Talbot, Swansea, Carmarthenshire and Pembrokeshire.

We also engaged stakeholder organisations and representatives across the region, including from local authorities, health boards, education, businesses and third sector.

See appendix C for a complete list of stakeholders contacted and appendix D for meetings/workshops held.

How we engaged

TfW 'Have your Say'

We asked for feedback on the Proposed Base Network, principally via TfW 'Have Your Say'; an online platform which is open to all for viewing information on our proposals and submitting a survey to give feedback.

To complete the survey, visitors must create an account and provide some basic information. This helps us capture demographic information to understand a little on who is taking part. See appendix E for demographic sign-up information requested.

TfW 'Have Your Say' hosted background information on bus reform, FAQs, information on the reasons for our engagement, public events information, maps and the survey.

Maps

Maps were produced and placed both online at TfW 'Have Your Say' and on large boards for display at public drop-ins. We also hosted an interactive map on TfW 'Have your say'.

Links to the maps can be found in appendix A.

Survey

The online survey was made up of prompts and questions to gather construction information on how best we should further refine the proposed base network. It also had free text options. See appendix B for the survey in full.

For those unable to use the online survey, there were paper copies to be posted back to us or filled in at public events and left with us. We also placed a notice on our site to offer

support to anyone wishing to fill in the survey with help from our customer relations team (with contact details provided).

Meetings and Workshops

We hosted meetings and workshops throughout the period with the stakeholder groups listed above, as well as 'hearing from diverse perspectives' workshops in each county, with groups representing those with protected characteristics. Full information can be found in appendix D

Public drop-in events

We hosted public drop-in events at 22 locations across the region and took a stall at Pembrokeshire County Show. The public events schedule can be found in appendix F. We spoke to approximately 700-800 people during these in person events.

Partners from local authorities in South West Wales and the Community Transport Association supported us at a number of community drop in events.

Promotion of engagement

We promoted the engagement across the region, providing a link or QR code to TfW 'Have your Say' for people to find more information and take part in the survey.

We created the media campaign 'Your bus network, your voice' and shared this across social media (Facebook and Instagram), traditional media (local newspapers), out of home advertising (billboards, bus stops, on board buses and at rail stations), business cards (handed out at interchanges in key towns) and via community media where available. We also shared our campaign assets with stakeholders encouraging them to share more widely.

Examples of some of the campaign material can be viewed at appendix G.

In total, 25,400 visits were made to the English language 'have your say' landing page and 5,600 to the Welsh language version. The survey was opened 1,402 times (English language 1,388 and Welsh language 14) and completed by 679 respondents.

Initial Findings

Introduction

We received 679 responses to the online survey and 18 on paper. We also summarise the thoughts shared at public drop-in sessions and feedback taken at workshops with stakeholders.

These responses make up both quantitative data and qualitative data in this report.

The quantitative data is presented in a high-level summary below. The full dataset is available [here](#).

The qualitative responses were transferred to an artificial intelligence (AI) programme for initial consolidation of feedback. This was required due to the volume of responses received and to help create a structure for it for more in-depth human review and analysis.

This consolidated feedback has highlighted several high-level themes (which are included in this report) with further, more-in depth reviews ongoing.

Demographics

We received 679 responses to our survey, with demographic information for 37.1% of respondents. Where we have demographic information:

- 90.0% of respondents lived in South West Wales
- 74.1% of respondents were bus users
- 51.5% of respondents were women
- 26.2% noted they were a disabled person.

Summary of findings

- 60.0% of respondents would be willing to change between buses or trains if it meant they can get to their destination sooner. This suggests that connecting bus and train services is important
- 53.8% of the respondents agreed that bus network changes that improve the level of service for the majority of people should be considered, even if that inconveniences some people.
- 27.0% of respondents think our Proposed Base Network for 2027 will be better for South West Wales. 55.8% think it will be the same or aren't sure, and 17.3% think it will be worse.
- Low frequency services, and the lack of morning, evening and Sunday services was a common theme.
- It was challenging to capture the views of young people with just 2.8% of respondents being under the age of 25.

Summary of findings; quantitative data

The proposed base network

We asked people in the Proposed Base Network if they thought the network would be better for them, for people they know and better for South West Wales as a whole. Respondents showed highest support for the Proposed Base Network when asked if it would be better for South West Wales as a whole.

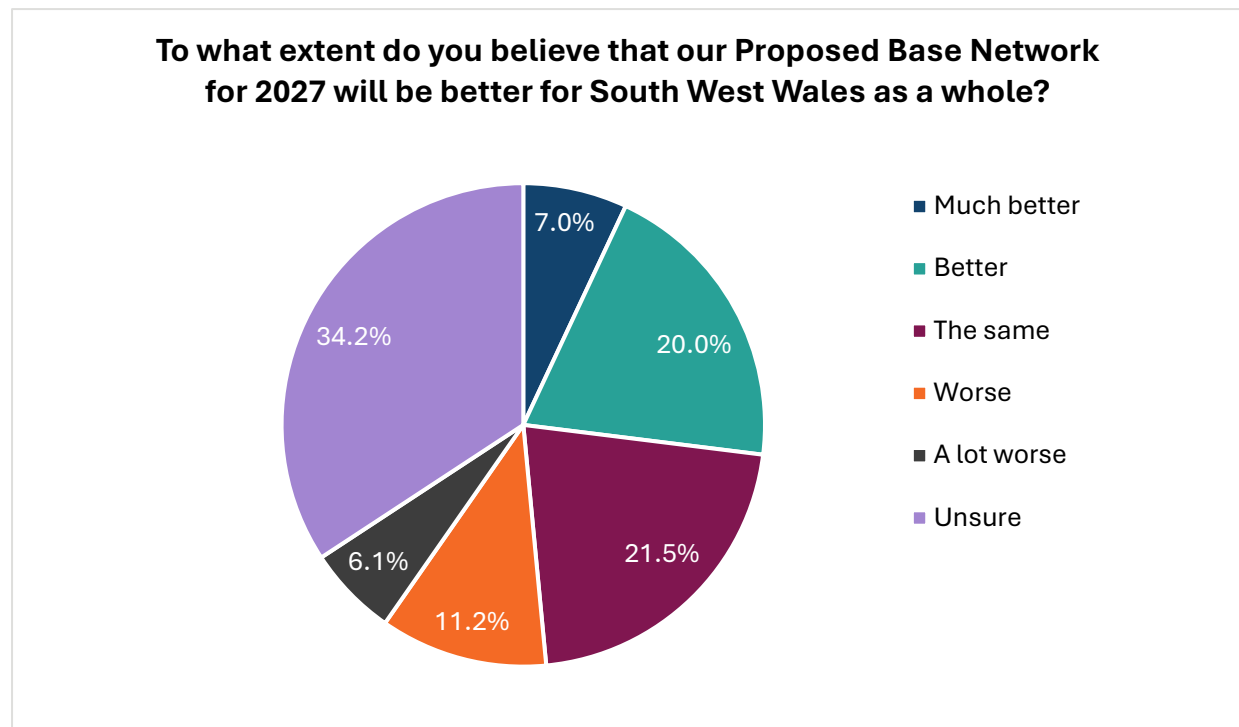


Figure 1: Pie Chart showing responses to 'to what extent do you believe that our Proposed Base Network for 2027 will be better for South West Wales as whole?'

27.0% of respondents agreed that the Proposed Base Network for 2027 will be better for South West Wales as a whole. 34.2% of respondents were not sure if it will be better, 21.5% thought it will be the same, and 17.3% thought it will be worse.

When asked if the Proposed Base Network will be better for the individual, there were differences in opinion. 20.1% of respondents thought it will be better for them, whereas 19.1% thought it will be worse. 39.6% of respondents thought it will be the same and 21.2% say they aren't sure.

Similarly, when asked if the Base Network will be better for people they know, 22.2% thought it will be better, whereas 18.3% thought it will be worse. 30.2% thought it will be the same, and 29.4% thought they aren't sure.

Routes most frequently commented on

The public engagement covered 180 bus services, including 46 proposed service changes. Respondents could give feedback on routes that had and did not have a proposed change. The routes that received the most feedback were:

- g11 Swansea – Carmarthen
- a2 Swansea – Caswell Bay/Newton
- 3A Bracelet Bay - Swansea
- 381 Tenby – Haverfordwest
- a11 Swansea – Loughor/Llanelli
- a4 Singleton – Morriston Hospital.

Trade offs

Network planning involves navigating different choices about how we best utilise our resources to deliver a network that meets local and regional priorities. We asked people to give feedback on these choices. We asked a series of statements and asked people to what extent they agreed or disagreed. We found that:

- 60.1% of respondents agreed that they would be willing to interchange between buses or trains if it meant they can get to their destination sooner.
- 53.8% of respondents agreed that network changes that improve the level of service for the majority of people should be considered, even if that inconveniences some people.
- 47.7% of respondents disagreed with the statement 'I would rather walk further to catch the bus, so that I can get to my destination sooner'. However, 46.3% also disagreed with the statement 'I would rather wait longer for a bus to come to the stop nearest to my home, even if that meant my journey takes longer.'

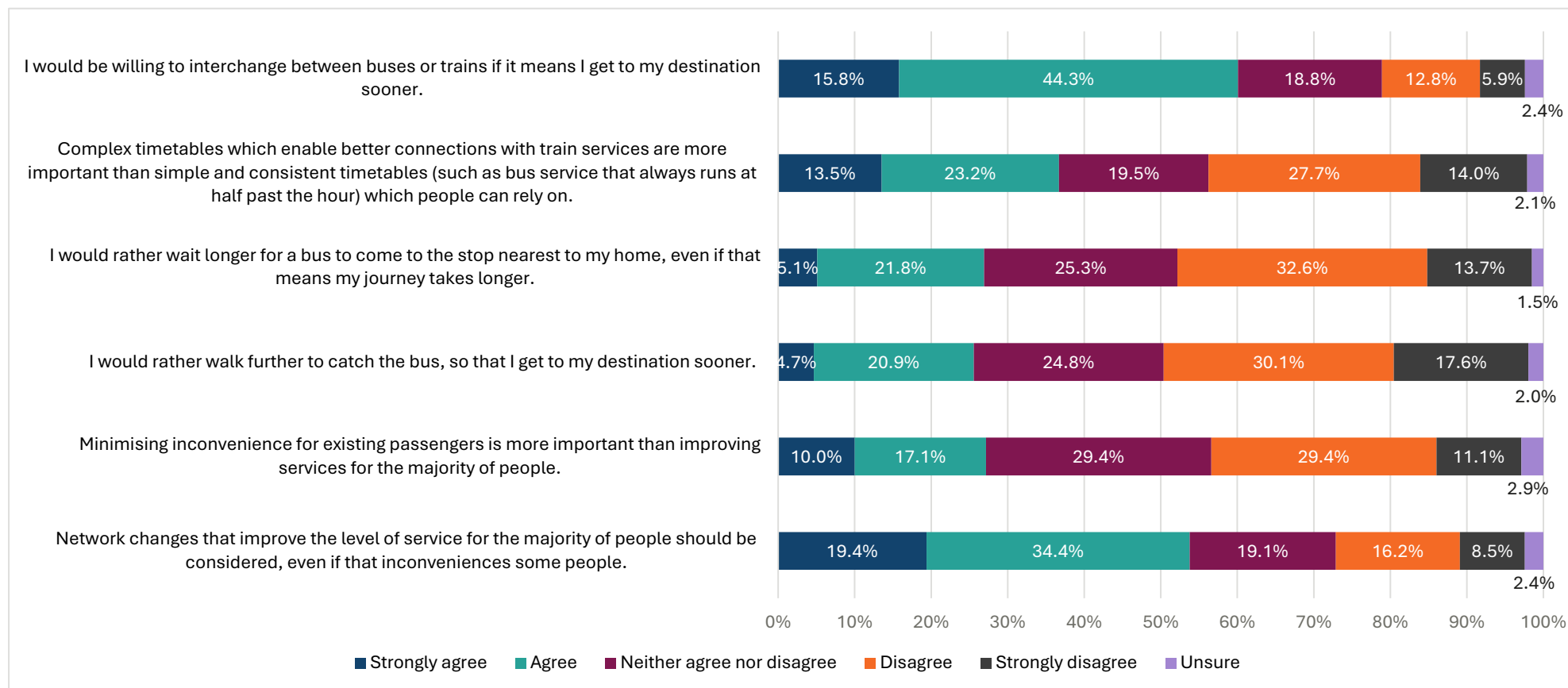


Figure 2: Bar chart showing responses to statements

Summary of findings: qualitative data

Key themes

In the survey, we provided a number of opportunities for respondents to write open text responses. We have analysed this data and note the following key themes raised by correspondents:

- **Frequency:** improved frequency of bus services to get where they want to go and attract more passengers to use bus services.
- **Hours of operation:** more services running early in the morning and later in the evening.
- **Sunday services:** more services running on Sundays, with particularly limited provision of public transport options on Sundays in South West Wales.
- **Service performance:** Service cancellations caused by vehicle breakdowns and poor punctuality were raised as issues.
- **Rail and bus integration:** bus and train timetables to be better coordinated with each other, and where possible, bus services to better connect with train stations.
- **fflecsi:** There is a large fflecsi operation in Pembrokeshire. Respondents from Pembrokeshire typically commented on the operation of these fflecsi services, sharing concerns that the process of booking fflecsi results in poor utilisation of the services. Other areas of South West Wales enquired about whether there is a role for demand responsive transport in the Base Network.
- **Social Isolation and rural connectivity,** for example "Provide a better and more frequent service in rural areas!"

Other themes that were raised included:

- Improving access to tourist destinations.
- Crowding is an issue on some services particularly in Swansea.
- Introducing more local hubs for services to connect into rather than Haverfordwest, Carmarthen, Swansea Bus Station and Neath.

We'll use this feedback to inform future aspirational improvements if more resource becomes available.

Themes from Community Drop-in Events

Verbal feedback taken at the community drop-in events was not captured verbatim as our teams spoke to over 700 people throughout the summer. However, reports were put together after each event to capture themes raised. The key themes of frequency, hours of operation and Sunday services were a common thread through the survey and in-person engagements. Other key themes raised at the community drop in events included:

- **Access to healthcare:** People told us about their challenges having to travel further by bus to attend healthcare appointments. Access to Glangwili Hospital was typically raised as a challenge.
- **fflecsi:** Residents in Pembrokeshire told us about their experiences using the fflecsi services. Some shared positive feedback about it opening up new travel opportunities, while others commented on the lack of utilisation and challenges associated with booking in advance.
- **Connecting bus and trains:** People often commented on how TfW should make bus and train timetables work together better.
- **Level of change and ambition:** Some people felt that the limited level of change in the Base Network was acceptable. Others shared expectations for a more transformational network to be delivered sooner.
- **September 2025 changes:** At community engagements in Neath, some people expected the engagement to be focused on the September 2025 changes brought in by the local operator instead of for the Proposed Base Network for 2027.
- **Cardiff to Swansea bus service:** This was typically a theme at engagement events in Swansea, with people commenting on the historic provision of the X10.
- **Lack of orbital and cross-city services:** Some people in Swansea commented on the hub and spoke network in Swansea being too oriented around journeys into the City Centre.
- **Access to the Mumbles:** Popularity of Mumbles as a key destination and some people suggested the traffic on Mumbles Road should be addressed with additional measures, alongside a good quality bus service.
- **Appetite for better connections to the South Wales Valleys** such as Merthyr Tydfil and Treorchy.

While the public engagement focused primarily on the Base Network, we wanted to hear from people about the other factors that shape their experience using bus services in the region. At community drop in events people often gave feedback on the following:

- **Bus stops and customer information:** People commonly told us about poor quality infrastructure, and lack of accurate real time information.
- **Role of community transport:** Some people felt that more information could be provided to better inform people of the community transport options in their area. Some people shared suggestions for community transport to have enhanced rural coverage.
- **Use of smaller vehicles:** There were views that mini or midi sized buses may be better for some rural areas, particularly with regards to the road network and passenger demand.
- **Service performance:** Comments included poor reliability of services and older age of vehicles in the region.

- **Service identity and branding:** Some positive feedback was shared around bus franchising suggesting that it would be ideal for TfW to introduce a single unified service identity to the region.
- **Fares:** Some people provided positive feedback on the recently launched Young Persons Fare, others commented on the price of bus fares being too expensive, and others commented on the price of rail fares in the region being too expensive.

Stakeholder Responses

Throughout the engagement window, we tabled the 'your bus service, your voice' conversation, to highlight our engagement plans, and to encourage input to the survey (where relevant) at our regular stakeholder meetings and panels. These included the Local Authority Regional Meetings (in South West Wales, South East Wales, North Wales and Mid Wales), Bus Reform Industry Panel, TfW Advisory Panel, Transport Liaison Group and TfW Access and Inclusion Panel.

Alongside our scheduled stakeholder meetings, we hosted workshops throughout the engagement and invited stakeholders across the region to participate. These workshops were not attended by members of the public. We have outlined these below, with a summary of the findings.

Swansea Bay Travel Planning Forum – Base Network Workshop

Attended by Swansea University, Transport for All Swansea, Natural Resources Wales, DVLA, Cardiff & Value University Health Board, Community Transport Association, Museum Wales and Swansea Bay University Health Board.

Key points included the importance of cross-city routes, reaching young people through the engagement, working with employers to understand commuting patterns, addressing congestion and, enhancing connectivity to key transport hubs. Additionally, the benefits of the recent extension of the new X1 service to Singleton campus were raised.

Routes to Education Workshop

Attended by Pembrokeshire College, Gower Colleges, Swansea University, University Wales Trinity St David, Coleg Sir Gar, NPTC Group of colleges.

Key points included ongoing challenges related to bus services for college and university students, particularly concerning the misalignment of bus schedules with academic timings and inadequate routes connecting key campuses. There is a consensus on the need for better integration between public transport and educational institutions, including a more consistent approach to service delivery and possible enhancements to infrastructure. The importance of offering a unified pricing system for students was also stressed, along with the need for collaboration with local authorities to gather vital data for decision-making on these matters.

Diverse Perspectives from...

Neath Port Talbot - Very engaged session with a broad range of stories from across the community, experiences shared and the vital importance bus services play in the community was a key theme including for those experiencing social isolation and with protected characteristics.

Swansea -Well attended, engaged and emotive session with powerful stories shared of personal and broader experiences on bus services. Key themes included the importance of ensuring bus services are accessible, barriers are addressed and how they are key to many people's independence.

Carmarthenshire – No members of the community attended this session.

Pembrokeshire - Great insights from members of Young Voices for Choices and Pembrokeshire County Council during this session. Positive and negative experiences explored in detail and discussions on how experiences on bus services can be improved.

We have also received some written feedback from stakeholders. We have acknowledged and considered this feedback as part of this engagement.

Next steps

We're working with local authority partners to review the feedback and identify opportunities to take on board the feedback we have gained. We're still planning to deliver the Base Network within the same level of resource that exists in the system today.

In December, we'll issue another report setting out how we have considered some of the feedback, and where we have updated the Proposed Base Network.

Beyond this, we plan to include the South West Base Network in the Welsh Bus Network Plan with the support of the region. We'll then develop detailed timetables to deliver the routes and frequencies set out in the Base Network, and operators will bid to deliver this Base Network. This means the Base Network will be implemented in South West Wales in 2027. Some further network changes may need to take place and we'll clearly communicate these in advance of Bus Franchising starting in South West Wales in 2027.

When franchising is introduced, we'll continue to listen to communities and work in partnership to further develop the bus network.