



A Manifesto For the Future of Welsh Transport

April 2026


INTRODUCTION


Delivering the Future of Welsh Transport


This Manifesto sets out four key recommendations for the future of transport in Wales. Working with the Welsh Government, the transport technology sector can help support productivity, economic growth and job creation across the nation.

Transport technology can help tackle many of the social, economic and environmental barriers and support communities and businesses across Wales.

Value of the ITS sector to Wales

 £100 Million in Gross Value Added

 1,420 jobs

 £70,422 in GVA per job, higher than the national average of £55,141 [1].

Summary of Recommendations

1. Build on the efforts to rollout smart ticketing to improve public transport integration, ridership and the passenger experience
2. Support applications of traffic technology to make better use of existing road infrastructure
3. Mandate open, standardised, real-time data as the backbone of a national MaaS Scheme
4. Continue to support on demand bus services across the nation

1 Build on efforts to rollout smart ticketing to improve public transport integration, ridership and passenger experience

Currently, 19.4% of Welsh households do not own a car or a van [2], making access to public transport essential for many to travel for work, leisure or access services. Yet, public transport ridership is still recovering from the pandemic and at slower rates than other regions and nations [3].

One of the key ways to encourage greater public transport use is by tackling the fragmentation of transport data and ticketing, and disjointed connections across modes of travel [4].

With a fifth of households entirely reliant on public transport, and a third of the Welsh population living in rural areas, it is imperative that we make access to public transport more reliable, easy and efficient.

Welsh Government can deliver a more seamless, reliable public transport network for the many households across both rural and urban areas, by building on current efforts to deploy smart ticketing (including contactless and digital Pay As You Go, and mobile and account-based ticketing).



2. <https://www.gov.wales/sub-regional-productivity-2002-2023-html>

3. <https://www.ons.gov.uk/datasets/TS045/editions/2021/versions/4#variables>

4. <https://research.senedd.wales/research-articles/keeping-track-scrutiny-of-transport-for-wales/>

Smart ticketing can improve integration by providing an easier, frictionless method of payment, whilst guaranteeing equitable fares for travellers.

Current efforts in Wales are already seeing success, with pay-as-you-go journeys on Transport for Wales's rail network reaching two million towards the end of 2025 - up a fifth in 24/25 from 23/24 over the same period [5].

Meanwhile, bus services in Wales have begun to deploy tap on, tap off technology and fare capping, contributing to an 11.4% increase on bus journeys run by Transport for Wales in 24/25 over the same period.

As technology evolves, innovative ticketing solutions, such as app-based Digital Pay-As-You-Go (DPAYG) are worth exploring too, particularly in areas where the implementation of infrastructure-heavy solutions are not viable.

Digital PAYG can complement the new tap-on, tap-out solutions currently being rolled out, while also providing a way to integrate cross-border ticketing,

supporting journeys that start in Wales and finish in England.

The use of smart ticketing technology, throughout the transport network, is a key enabler of more joined-up journeys which can simplify the use and cost of public transport, incentivising uptake.

Continuing to deploy smart ticketing technology will achieve a modern seamless transport network, that is convenient for all passengers.



2 Support the upgrading and renewal of traffic technology to make better use of existing infrastructure, improve safety and prepare the transport network for the future

The deployment of modern traffic management technology can provide a low-cost path to help address the Welsh productivity gap, whilst improving safety and ensuring the network is ready for new technology, such as connected and automated vehicles.

Innovative traffic management can lower costs by optimising capacity on the road network and reducing congestion through the use of real time data, bus prioritisation, and connected vehicle services that can relay real-time journey information to passengers.

With major road infrastructure schemes on pause, and a tight fiscal environment, the Welsh Government should leverage advancements in traffic management technology to maximise existing capacity on the road network. [6]

Upgrading Wales's traffic technology infrastructure is not just a matter of improving road outcomes and reducing costs, but also of replacing

an ageing traffic signal estate.

Currently, a significant number of road assets in urban environments are at - or are nearing - the end of their lifecycle. For example, in Swansea, data from ITS UK members shows that almost 60% of traffic signal controllers are life expired.

Regardless of whether a Welsh Government invests in new road capacity, investing in cutting edge traffic technology is low-hanging fruit that will improve road outcomes in safety, energy, costs and capacity.



3 Mandate open, real-time data as the backbone of an integrated transport system

The effective use of public transport data forms the backbone of any efforts to deliver a holistic, integrated transport network. As stated in Transport for Wales’s National Transport Delivery Plan 2022-2027, the objective for the Welsh transport network is ‘one network, one timetable, one ticket’ [7].

To achieve this, we recommend Welsh Government establishes clear data policies and, where necessary, legislation and regulation, to require public transport operators to provide (non-sensitive) standardised, real-time data on timetables, fares, service availability, disruptions and ticketing in formats suitable for third-party use.

This data will help inform the design of the network, revenue projections, allow for transport operators to simulate interventions to improve performance or mitigate risk and provides useful evidence to policymakers. Furthermore, the consolidated and open provision of this data will allow transport modes to align their services, allowing third parties to innovate with the data.

Current projects like the Welsh Bus Data Service, are a great first step towards unifying and consolidating data in pursuit of an integrated network. It is positive to see TfW enlisting the private sector to develop a multimodal digital booking system comprising all transport modes (or MaaS App).

ITS UK urges all political parties to empower TfW’s ongoing body of work in designing and delivering a digitally integrated transport network by ensuring all transport data is standardised, accurate, machine readable and in formats third parties can access and use.



4 Continue to support on demand bus services across the nation

In 2020 Wales introduced the Fflecsi bus service, a demand-responsive transport (DRT) initiative to provide flexible, on-demand alternative to traditional bus services, especially in areas where fixed routes may not be viable. The service uses digital technology to provide dynamic on demand local transport, which is especially effective at supporting rural areas where fixed route services may not be viable.

Demand-responsive bus services should continue to be deployed as part of Wales's transport offer, given evidence of the Fflecsi scheme thus far, shows they are a practical way to sustain access to transport. This is particularly true in rural communities, where they helped keep bus provision going during the pandemic and are still seen as an important part of the public transport mix [8].

To maximise the value of this support during an increase in the availability of DRT, Welsh Government should maintain national backing for Fflecsi's core platform, call centre, and marketing, providing a holistic service for the whole of Wales. The current model sees benefits from economies of scale and ensures all Welsh residents benefit from our scheme.

Further support for the DRT scheme should be targeted at increasing awareness of the service, understanding about who can use it, and ensuring it remains reliable to all communities. We suggest marketing and public awareness efforts should emphasise clear information, simple booking guidance, explanations of operating areas and times, and continued support for telephone booking as well as app-based access.



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